



Strategic
Financial
Solutions™

Outline of Integrated Investment Process

Pre-Engagement Services

Personal Objectives Assessment

- The Recap
- The Asset Analysis
- The Snapshot

Money Guide Pro

- Organization and Clarity
- Financial Planning
- Education Funds
- Risk Management

The Financial Priorities

- Current Considerations
- Future Considerations

Goal Management*

Quarterly / Semi-Annual / Annual Plan Review

- Investment performance and asset selection
- Portfolio Snapshot (semi-annually)
- Rebalancing (Strategic; annually)
- Current Recommendations
- Future Investments

Investment Communication and Additional Services

- Educational Workshops
- Estate Planning
- Financial Professional Consultations & Interactions

**Depending on the service, there may be fees, commissions or other costs. Please review applicable agreements for an explanation of services and costs.*

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