



# The Wealth Maximizer

Our Wealth Maximizer is a four-phase process designed to thoroughly understand your personal financial situation and maximize the value of our professional advice to you. By taking the time to truly understand your hopes, dreams, and goals, we can develop personalized financial strategies to help you achieve your life aspirations.

## 1 THE DISCOVERY PROCESS

- The Discovery Meeting
- The Independent Advantage
- The Fiduciary Approach

## 2 THE GAME PLAN

- The Collaborative Team Approach
- Money Management Options
- The Bucket System

## 3 THE SOLUTIONS KICKOFF

- Service Solutions Experience
- The 45 Day Review
- The FFP Wealth Management System

## 4 THE BRIGHTER FUTURE

- The Relationship Expander
- The Income Navigator Report



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