FINANCIAL LIFE PLANNING & DESIGN

We believe these engagements deliver unique and refreshing perspectives as we blend life with financial matters, delivering them with elegant simplicity when possible. We believe successful engagements occur when those we serve feel cared for and empowered, and are clear about their choices, decisions, overall financial well-being, and strategy.

Getting to Know You

Determining our compatibility is a vital first step in our process (*at no cost or obligation*).

SCHEDULE A 20-MINUTE FIT CALL:
Let's explore whether your needs align with our expertise and if we'd work well together.

IF THE CONNECTION FEELS RIGHT:
We will send you a Getting to Know You survey, followed by a 45-minute call to discuss your answers and clarify your objectives.

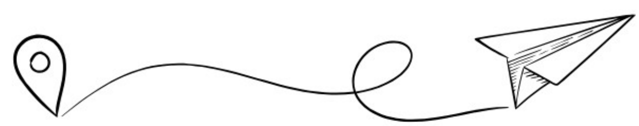
NEXT STEPS:
Upon proceeding, we will provide an engagement letter outlining our services. Our typical engagement lasts 2 to 3 months, with costs ranging from $3,000 to $7,000.

Our Engagement

Exploring & Mapping is a limited engagement that emphasizes financial life planning and guidance only, NO product sales or accounts established, and typically involves three meetings.

Engagement Experience

Discovery | We begin by asking for detailed information about your current situation (*human sides & technical sides of money*).



Preliminary Visit *(Analysis)* | In this visit, we confirm that we have interpreted the information provided correctly and ensure we are on track for our planning engagement.

Scenario Visit *(Stress Test)* | In this visit, we explore different planning scenarios, portfolio strategies, and how various decisions could impact your journey.

Final Visit *(Optimization)* | In this visit, we present a comprehensive financial plan, including detailed tactical and strategic recommendations. We will provide action items, highlighting strengths, opportunities, and steps to optimize your strategy.