

BEHAVIORAL DNA CLIENT DISCOVERY PROCESS

DNA
DISCOVERY



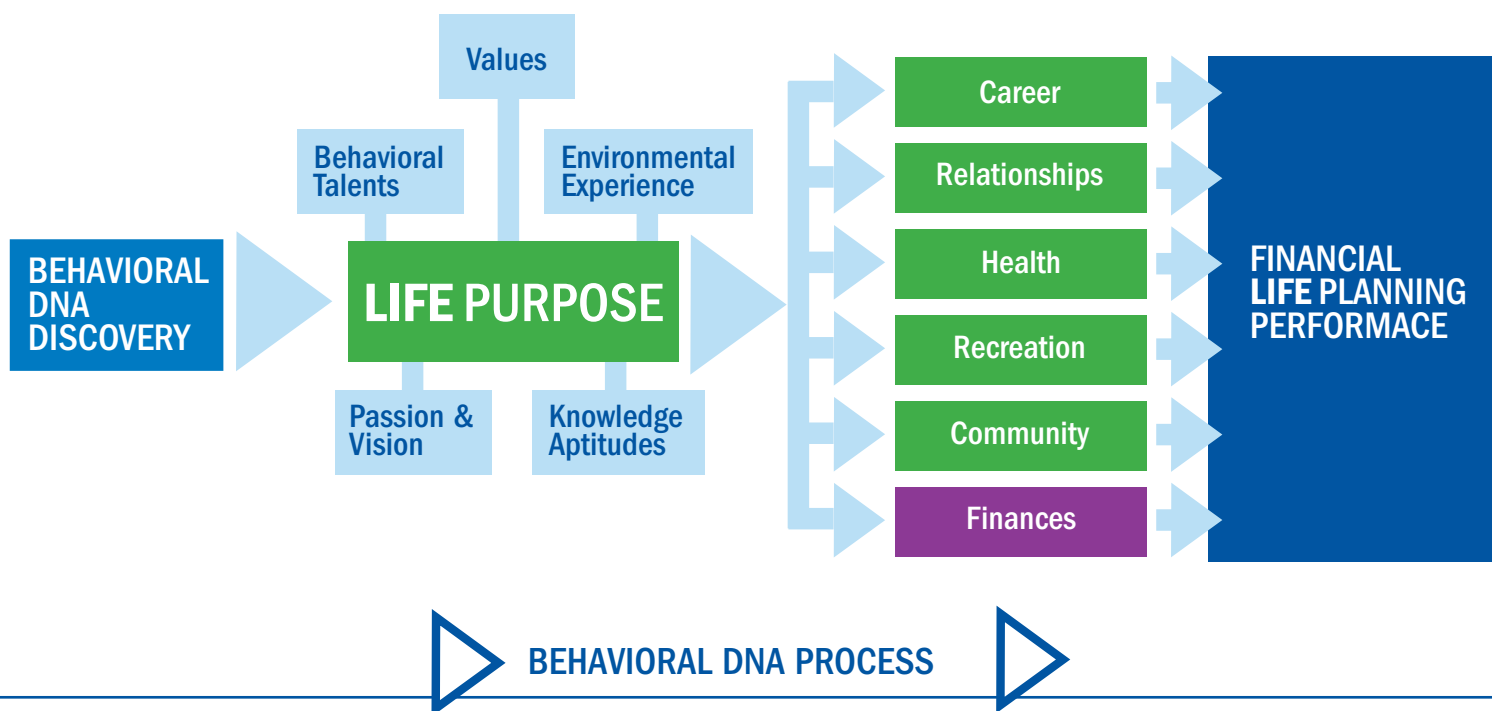
FACILITATION
OF DISCOVERY



QUALITY
LIFE GOALS



DOCUMENTATION
& ACCOUNTABILITY



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25 YEARS+
OF DEDICATED SERVICE

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Connect with Rick!

**UNDERSTANDING
YOU BEFORE
THE NUMBERS**

Our Definition of Financial Life Planning Performance

“Guiding you to confidently make committed life and financial choices that will improve your relationships, quality life and financial performance.”

This is achieved by understanding your unique financial personality—your “Behavioral DNA” and then tailoring a financial strategy to help you live with meaning™.

The process seeks to:

- Recognize the impact of your past, present and future life financial experiences.
- Place your life at the center of the financial life plan.
- Bring an understanding of the meaning of money to your life.
- Provide wealth mentoring to guide you and enable you to improve and enhance your quality of life.

