

FINANCIAL LIFE PLANNING

What is Financial Life Planning? _____

Financial Life Planning is a holistic process that puts your interests first and focuses on increasing your sense of financial well-being and life satisfaction. Initially, this process will help you to clarify your values, priorities, circumstances, and aspirations; and then guide you in defining and designing your unique version of the “rich life.” In addition, Financial Life Planning will increase your understanding of the habits and attitudes that will facilitate your financial and life goals and support successful life transitions.

Why Choose a Financial Life Planning Advisor? _____

Because of the unpredictability of life and the complexity of financial markets, it is important to work with a financial advisor who will help you to achieve your financial and life goals. And, it is essential to select an advisor who will take the time to truly get to know you and to understand your concerns and your dreams.

Rising to this challenge is a small, but growing, cadre of life-centered financial professionals who are leaders in the trend of integrating financial planning and life planning. That means they are dedicated to understanding each client’s unique set of values, priorities, challenges, and opportunities in order to make the most appropriate financial recommendations.

Therefore, in addition to traditional discussions of assets and net worth, these unconventional advisors are asking their clients, “What will bring meaning and purpose to your financial life?” If you are among those individuals disillusioned with the results of “using your life to make money,” you will find the opposite mind set of “using your money to make a life” to be both liberating and compelling.

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