

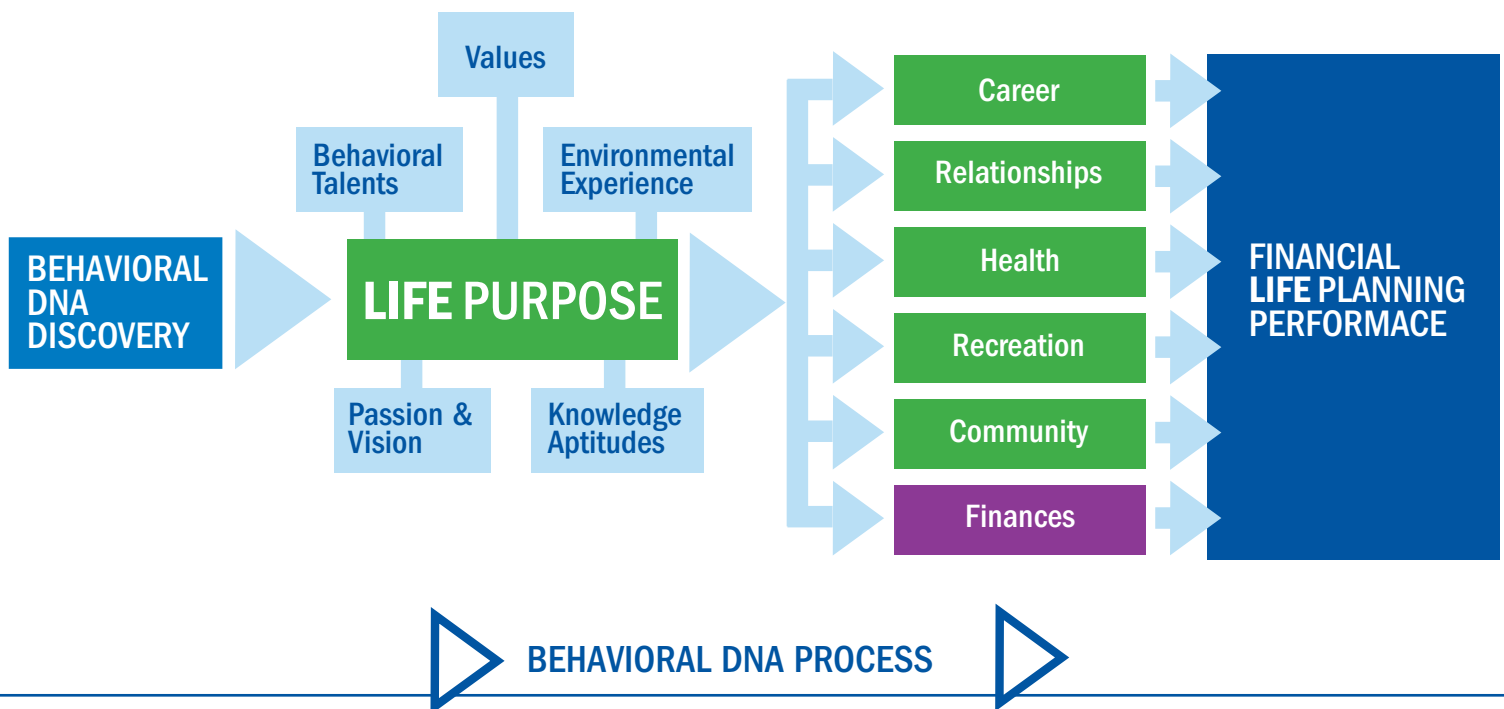
BEHAVIORAL DNA CLIENT DISCOVERY PROCESS

DNA
DISCOVERY

FACILITATION
OF DISCOVERY

QUALITY
LIFE GOALS

DOCUMENTATION
& ACCOUNTABILITY



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Connect with Rick!

SOMEDAY
BEGINS
TODAY

Our Definition of Financial Life Planning Performance

“Guiding you to more confidently make committed life and financial choices by building 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.

