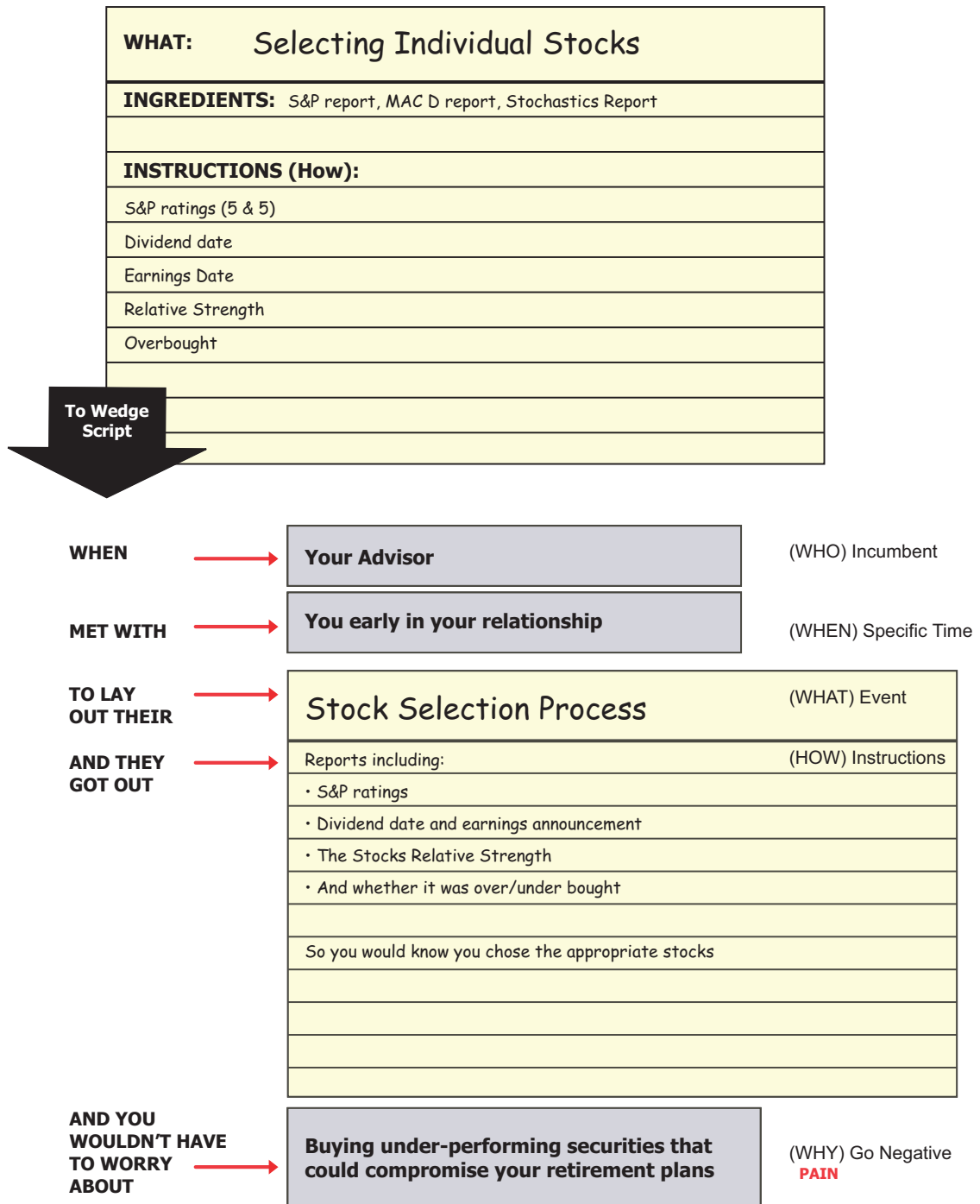
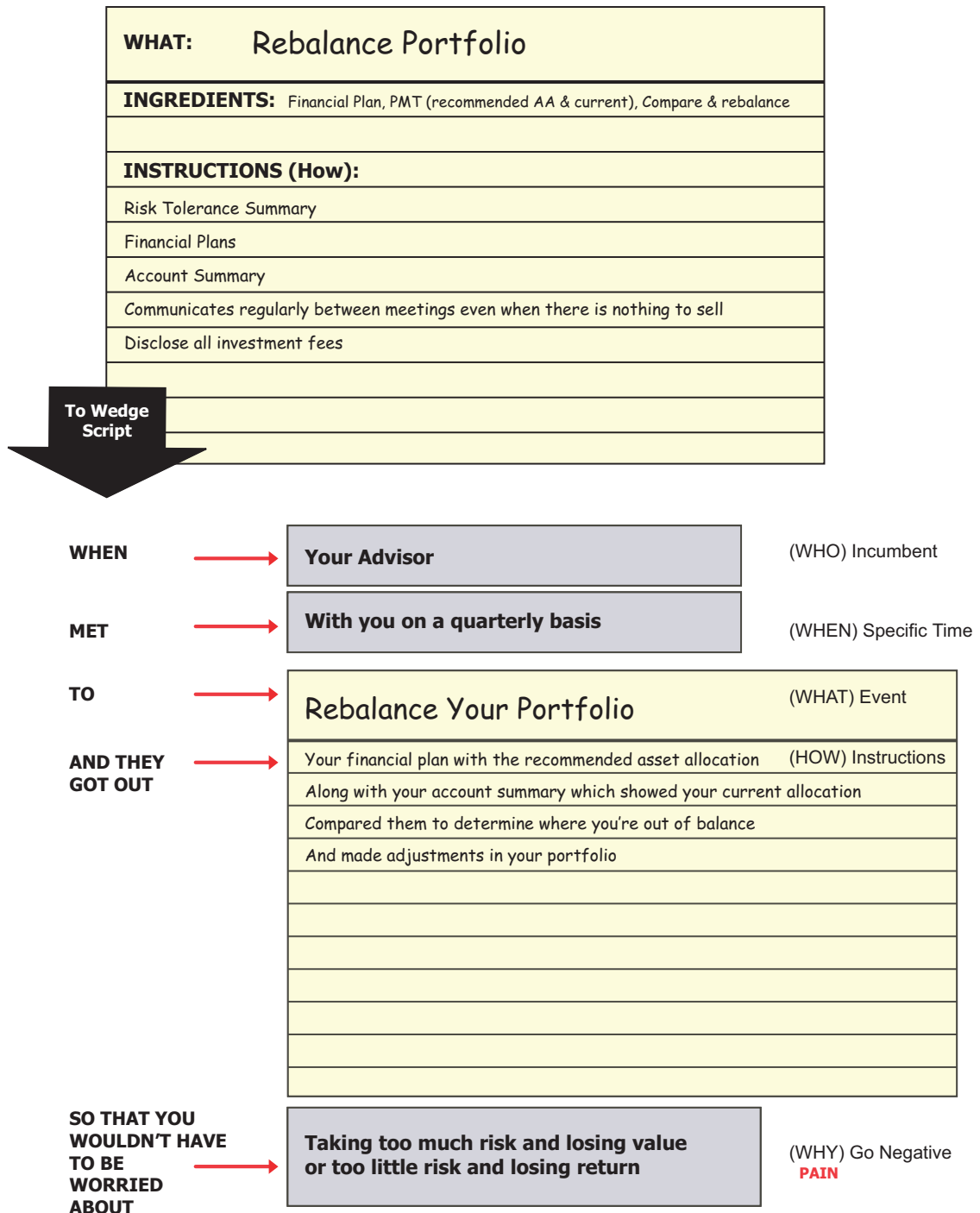


Picture Perfect Recipe Card: Stock Selection Process



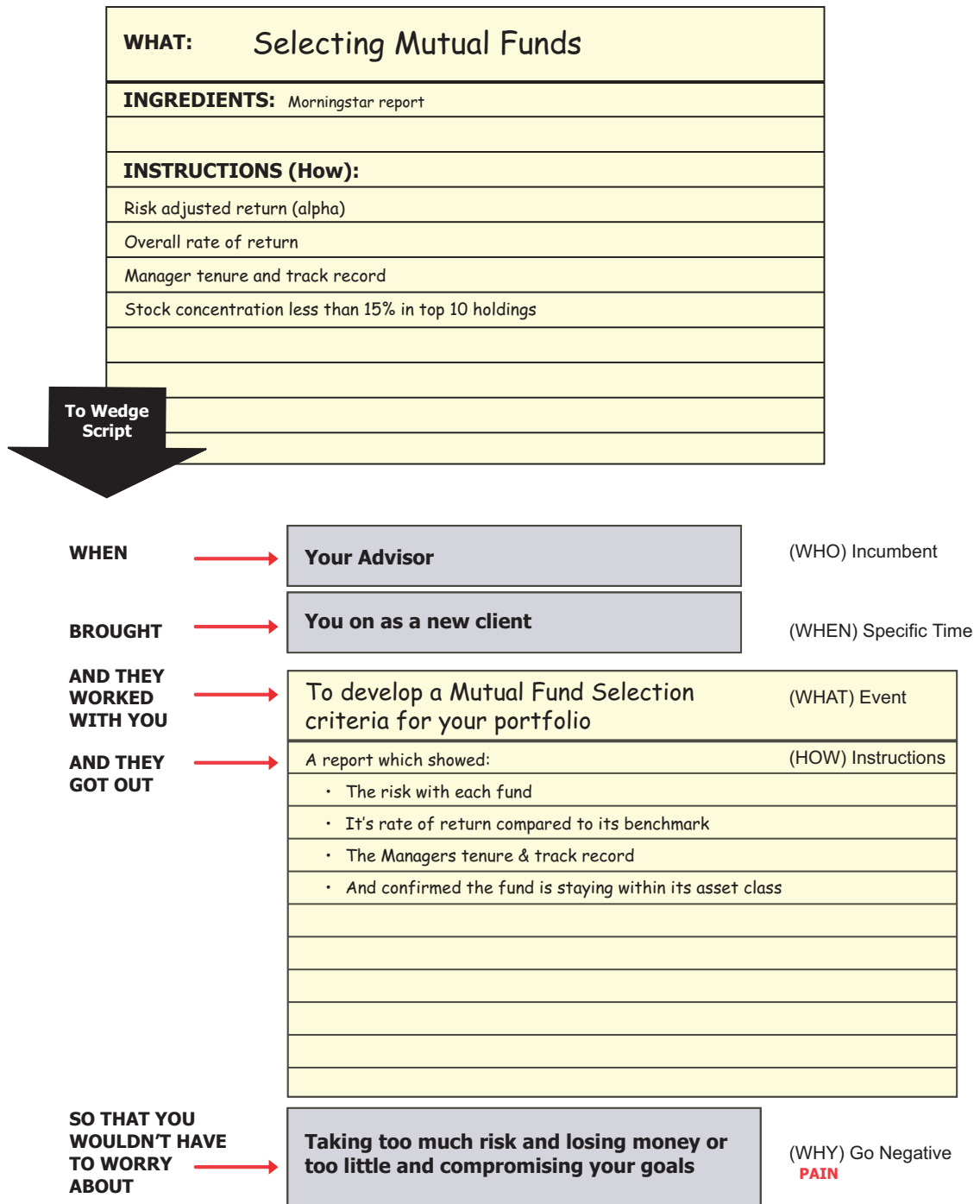
I'M CURIOUS, WERE YOU COMFORTABLE WITH HOW THEY WENT THROUGH THE PROCESS?

Picture Perfect Recipe Card: Rebalance Portfolio



I'M CURIOUS, WERE YOU COMFORTABLE WITH HOW THEY WENT THROUGH THE PROCESS?

Picture Perfect Recipe Card: Mutual Fund Selection



I'M CURIOUS, WERE YOU COMFORTABLE WITH HOW THEY WENT THROUGH THE PROCESS?

Picture Perfect Recipe Card: Comprehensive Financial Plan

WHAT:	Financial Planning
INGREDIENTS:	Financial Plan, Account Summary, Will, Insurance Policies, Trusts, Bank Statements, Liability Statements, Benefits
INSTRUCTIONS (How):	Goal setting Analyzes your entire financial situation Customized annual financial and life plan Manages your benefits Facilitates meetings with your other trusted advisors Introduces new strategies to reduce taxes and increase net worth



WHEN



Your Advisor

(WHO) Incumbent

MET WITH YOU



As a new client

(WHEN) Specific Time

TO DEVELOP



A Comprehensive Financial Plan

(WHAT) Event

AND THEY REVIEWED



Your current situation including
Assets, liabilities, cash flow and legal documents
Assisted in developing goals for
Retirement, education and estate transfer
And then worked with your other advisors to execute the plan

(HOW) Instructions

SO THAT YOU WOULDN'T HAVE TO WORRY ABOUT



Missing your goals, overpaying tax or leaving your assets to the wrong people

(WHY) Go Negative
PAIN

I'M CURIOUS, WERE YOU COMFORTABLE WITH HOW THEY WENT THROUGH THE PROCESS?