

Life's transitions can be emotionally and financially devastating. However, they can also be a time of hope—providing an opportunity to establish a solid financial foundation as you embark on new beginnings. Your success depends on the steps you take to secure, build and protect your worth—both net worth and self-worth.

As your Financial Strategist, I will teach you how to establish a solid financial foundation, how to take charge of your financial well-being and how to fully realize the profound impact that an improved relationship with money can have on the next chapter of your life.

### — STEP 1 —

#### EXPLORE *internally*

After a life transition, it's not uncommon to feel lost—to lose focus or feel out of touch with who you are and who you want to be. Your financial goals are intrinsically tied to your life goals. Together, we'll identify your short and long-term financial objectives, as well the vision you have for your next chapter.

### — STEP 2 —

#### EVALUATE *the reality*

Together we will organize and evaluate your current financial landscape. I examine all inflows and outflow, identify inefficiencies in your spending habits and review details surrounding your assets and liabilities to ensure that you're maximizing the earning power of your money. With your personal goals in mind, I develop strategies to optimize the way you live on a daily basis

### — STEP 3 —

#### ENGINEER *a plan*

I will design a personal financial roadmap for you, complete with strategies to maximize your success. I don't simply create a budget and say, "Good Luck." I help you build a new and meaningful lifestyle that reaches far beyond the income you make and the dollars you spend. It is an individualized approach that will inspire you and keep you on track toward a thriving life!

### — STEP 4 —

#### EQUIP *yourself with a team*

Embarking on a new life necessitates a top-notch team. Together, you and I will assemble a group of legal and financial professionals, including an estate-planning attorney, a wealth advisor and a CPA. We will select experts who share your values and ideals and who possess a strong desire to work with each other to preserve your income, protect your assets and build your net worth.

### — STEP 5 —

#### EDUCATE *yourself*

You're transitioning from a partnership to a future in which you'll be solely responsible for your financial well-being. I'll be there to guide you. But along with being your advocate, I'm also your educator. I'll teach you the terms, tools, principles and practices you need to shape your own financial destiny and make informed monetary decisions in the future.

### — STEP 6 —

#### EXECUTE *daily*

Once you have a solid plan in place, you will need to apply what you have learned to daily life—whether buying a new car or planning your next vacation. I'll provide you with strategies for success. While I am always available as an adviser, my goal is to empower you to feel confident managing your day-to-day finances and be at the helm of your financial team for years to come.