FOUR LEAF

FINANCIAL PLANNING

Traditional Financial Planning Services

Our Planning Process

FOUNDATION

- Get Organized and Gather Data
- Understand your goals, concerns, and priorities
- **Deliverables:** Personal Dashboard, Meeting Summary
- **GOAL: Set course ahead**

ROADMAP

- What you earn and how you spend
- What is excess or shortage and how to handle
- Where to first? Savings, Insurance, Tax, Investments, etc.
- **Deliverables:** Cash Flow Report, Financial Roadmap
- **GOAL: Understand Your Money and Options**

ACHIEVE

- Move through Planning Topics
- Recommendations, Decisions, Implementation
- **Deliverables:** To Do's, Follow Up, and Proactive updates
- **GOAL: Implement and achieve your goals**

REVIEW

- Annual or Semi-Annual meetings
- Newsletter and Education Events
- **Deliverables:** Decision Center and Scenarios
- **GOAL: Keep you on track and be proactive**

Our Tool Box

- Financial Organization
- Cash Flow and Spending
- Retirement Planning
- Tax Optimization
- Education Planning
- Social Security Planning
- Financial Goals and Priorities
- Risk Management
- Retirement Income Planning
- Employee Benefits Optimization
- Expert Collaborations (CPA, Attorney, etc.)
- Investment Review and Management

+ Personal Dashboard available 24/7 to track all accounts, and safely store personal financial information
+ Ongoing Access to Financial Advisor when needed.