The Family CFO® Process

CLEAR GOALS • REDUCED FINANCIAL ANXIETY • PEACE OF MIND • DELEGATED FINANCIAL DECISION-MAKING • FINANCIAL INDEPENDENCE • LIFETIME FULFILLMENT

1 The Exploratory Discussion

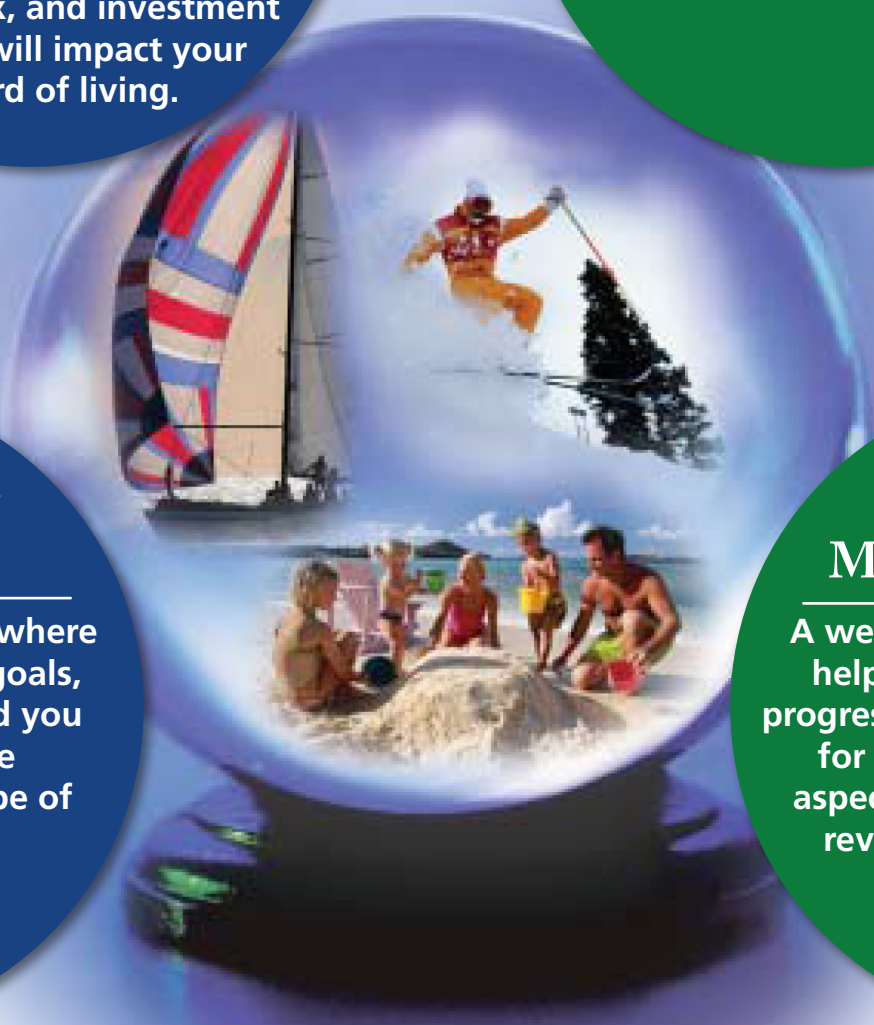
A "get acquainted" session where we learn about you, your goals, priorities and concerns, and you learn about us, our core competencies and the scope of our services.

2 The Discovery Session

An intensive fact-finding session where we become intimately familiar with your current financial situation and help you lay the groundwork for developing your financial game plan.

3 The Wealthcare Simulator

Detailed financial planning projections that provide you with "The Crystal Ball Experience®" for your financial future. Using our unlimited "what if" simulator, we help you analyze how alternative cash flow, tax, and investment strategies will impact your standard of living.



4 The Strategy Session

Goal setting to prioritize your short and long-term goals and development of the action steps necessary to put your financial game plan in motion.

5 The Family CFO® Solution

We assist you in implementing all of your financial decisions, including your estate analysis, managing your investments, minimizing taxes, resolving insurance issues, and securing your retirement.

6 The Wealth Management System

A wealth management tool that helps you track your financial progress and provides a mechanism for ensuring that the various aspects of your financial life are reviewed on a regular basis.