

FINANCIAL HEALTH CHECK-IN



AM I ON TRACK?

Our 3-step planning process is a simple way to evaluate your financial health and identify key opportunities.



BALANCE SHEET ASSESSMENT

How strong is my financial foundation?

We review your assets and liabilities to create a personalized balance sheet. We then highlight tax-aware ways to better align your resources with your goals.



WORKPLACE BENEFIT REVIEW

Am I maximizing my benefits?

Many people overlook the full value of their employer benefits. We evaluate your 401(k), stock options, HSA, and any other deferred compensation opportunities to help ensure you are getting the most from what's available.



RETIREMENT TRAJECTORY

Am I prepared?

We define your "Financial Freedom" goal, model your current trajectory, and explore "What-if" scenarios that may impact your future.

WHAT YOU'LL RECEIVE:

Clear insights and actionable steps to strengthen your financial future.



To get started, call, email, or schedule your consultation here:
913-276-7110 • [bridgequest.com](https://www.bridgequest.com)

8801 Renner Boulevard, Suite 403, Lenexa, KS 66219
913-276-7110

Securities and advisory services offered through Commonwealth Financial Network,[®] Member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services are separate from and not offered through Commonwealth Financial Network.

