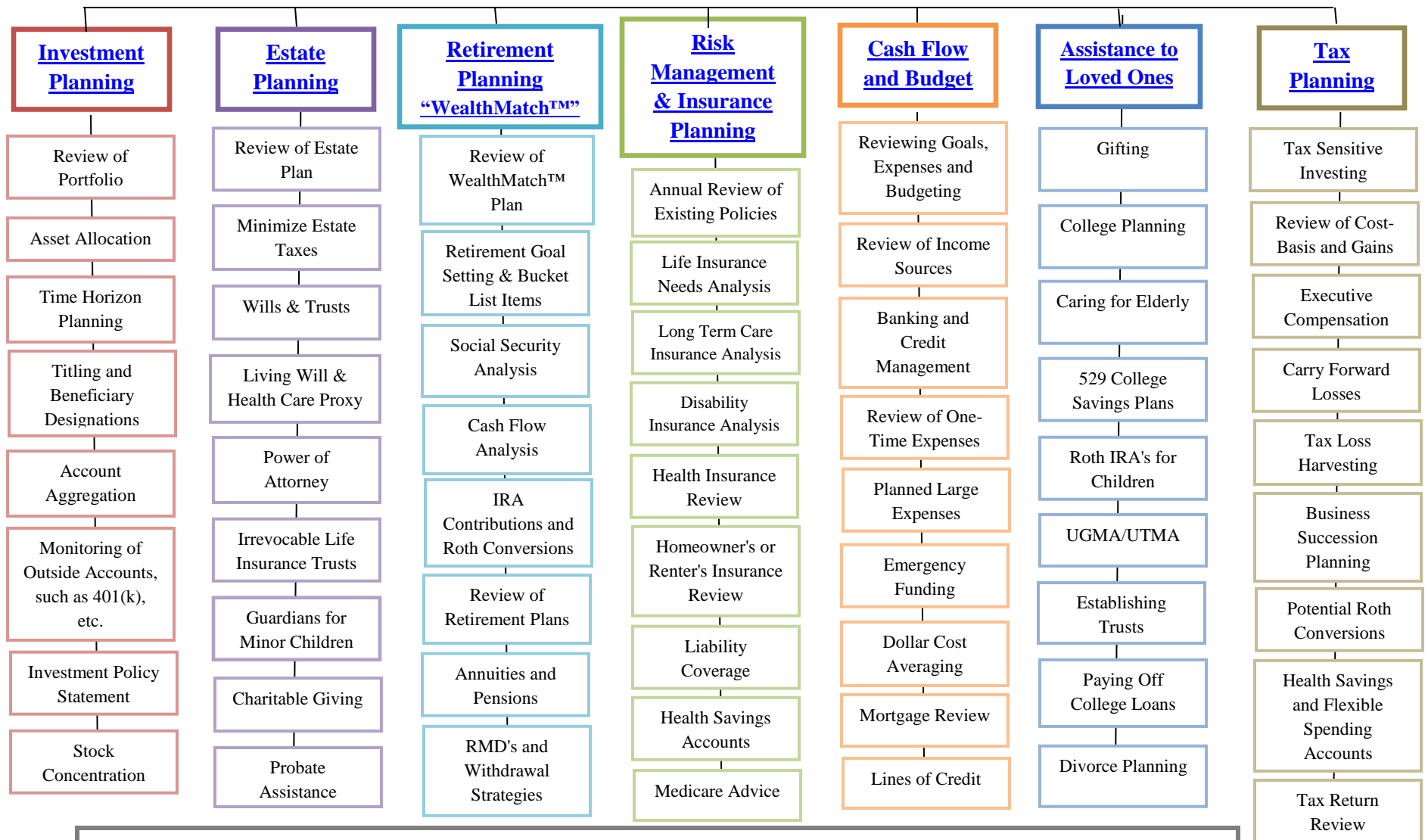


## FINANCIAL FUTURE PLANNING CHART™

### Services We Offer



#### **In addition to our services listed above, we also:**

- Hold regular meetings and ensure that all planning is well coordinated and implemented.
- Planning for incapacity.
- Coordinate with other advisors such as your attorneys and accountants.
- Maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.
- Work to ensure that your WealthMatch™ plan is on track to help guide you on your journey toward well-being and prosperity.

*None of the information contained herein is meant as tax or legal advice. Please consult the appropriate professional to see how the laws apply to your situation.*

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