



NAVIGATING YOUR
FINANCIAL FUTURE **TOGETHER**

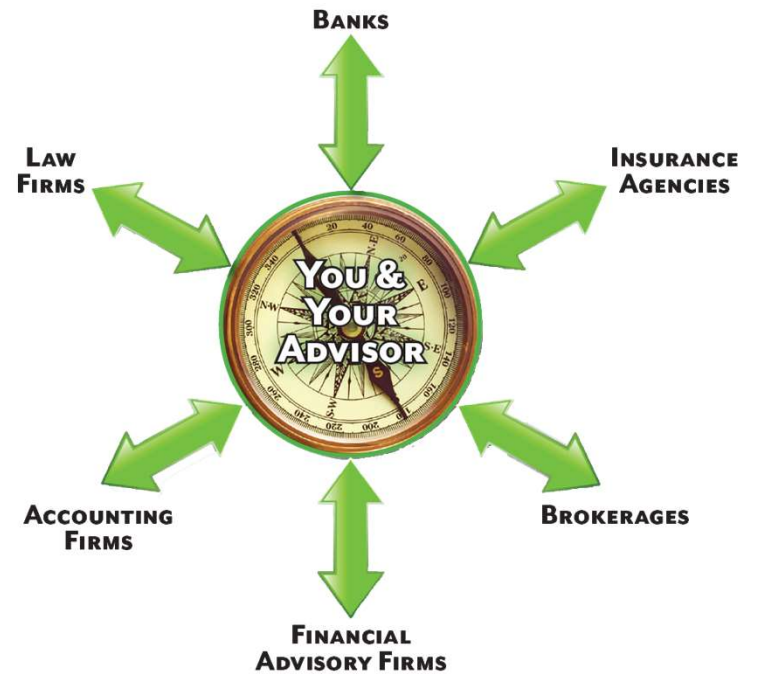


THE MODEL RELATIONSHIP

ISOLATION MODEL



HOLISTIC FUNCTIONAL MODEL



THE HIKE



MONITOR YOUR PROGRESS

optimize to achieve goals



IDENTIFY YOUR DESTINATION & GOALS

where you want to be



BEGIN YOUR JOURNEY

activate the plan



INVENTORY RESOURCES

what you have



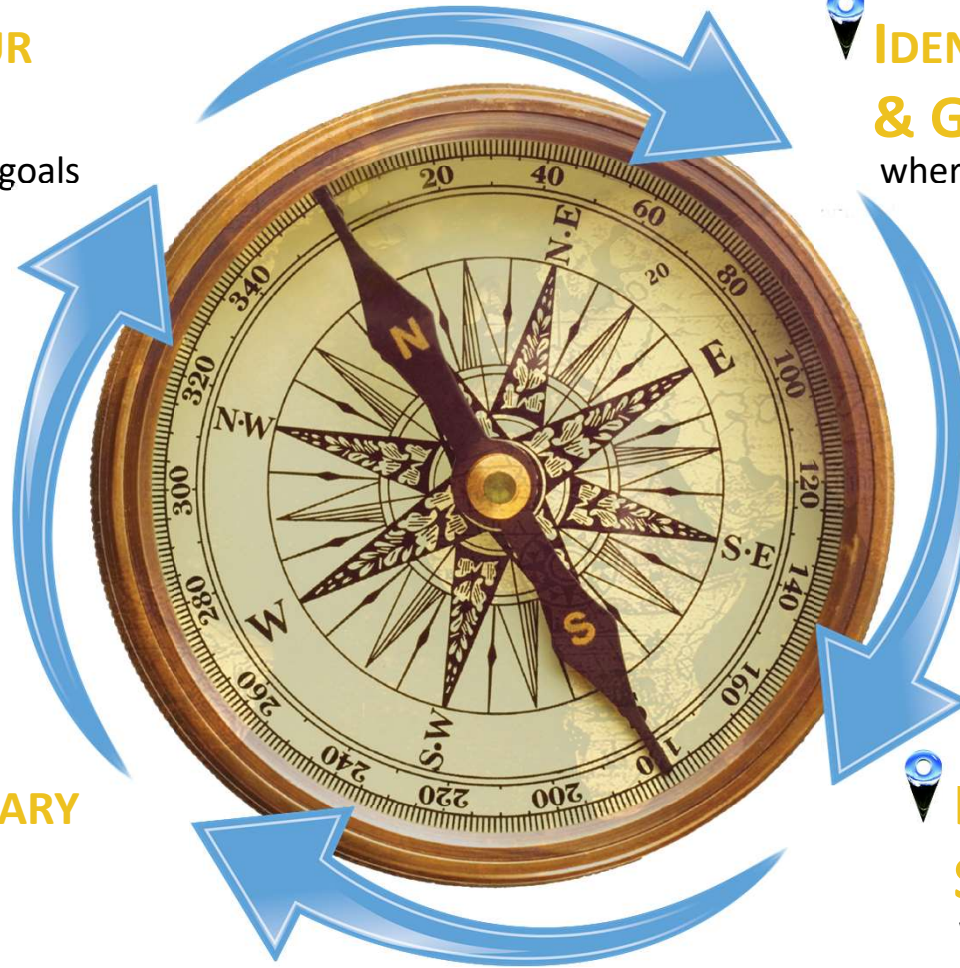
REVIEW ITINERARY & COURSE

how to get there



IDENTIFY RESOURCE SHORTAGES

what you need



OUR PROCESS

THE HIKE