

## Getting started

The **ON COURSE** process is about you. To do the best job we possibly can, we need to really get to know you, your current and future goals, and details about your financial situation. That may take the form of a questionnaire, an in-person interview, a phone conversation, or some combination of all three.

### The important thing is to get started!

While there will be some work involved for you to get the necessary information together, we are confident you will feel good about taking this important step toward your long-term financial success.

**“My passion is helping people plan for and plan in retirement. It’s rewarding to suggest to a client that based on our tools - and by going through the planning process - that they’re in good shape to retire at a particular age or standard of living.”**

— Fred Sirianni



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# ON COURSE™

## Personal Financial Navigation



**Everyone's goals  
are unique.**

**Let us help you  
realize yours.**



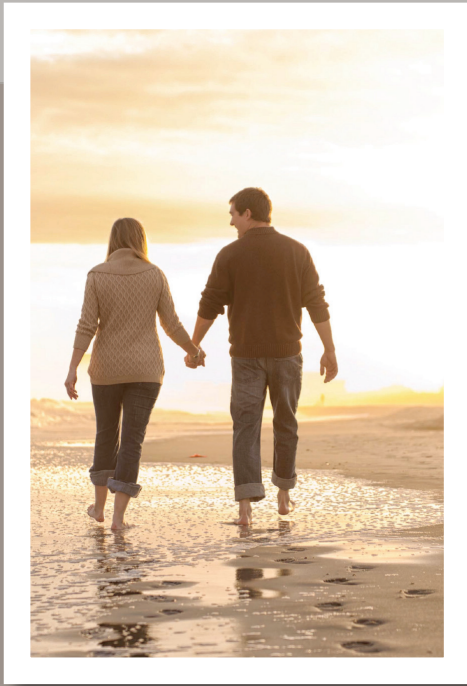
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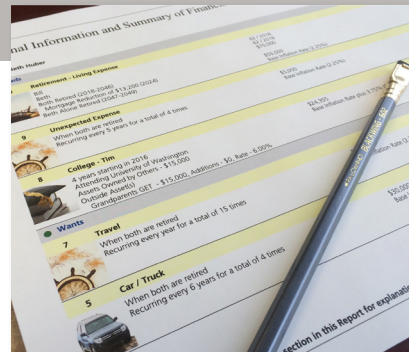
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## Personal Financial Navigation

“A high-quality financial plan helps toward clarity and order in your family’s financial life.” — Fred Sirianni

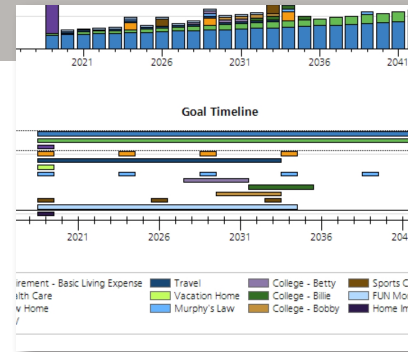


**Everyone’s goals are unique.** Whether they include retiring at 65, helping with grandchildren’s educations, or sailing around the world, our goals represent who we are—our hopes and our dreams. The only thing not unique about our goals is our desire to achieve them. That is where we, and our **ON COURSE** process, come in.



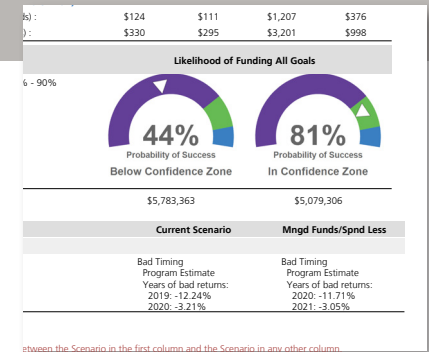
### Focused on you

**ON COURSE** focuses on what is most important: your goals. At D.A. Davidson & Co., we firmly believe that understanding your goals is essential to our ability to provide you with the best possible advice. Gaining a deeper understanding of what is most important to you helps us make better recommendations regarding all areas of your financial life.



### Keep things organized

Many of us can feel overwhelmed by the enormity of planning our financial future. Feeling this way often leads to inaction. With **ON COURSE**, we provide a straightforward yet comprehensive presentation of your current financial situation, assessment of how you are doing with respect to meeting your future goals, and provide you with recommendations for how you might improve your outlook.



### Stay on course

Financial planning is a process, not a one-time event. A plan is not a fixed and immobile line in the ground. It is a range of possibilities and needs to be routinely revisited. Understanding what could knock your plan off course is as important to putting it together. Regular review of your plan helps us to help you stay **ON COURSE** for meeting your goals.

