

6-Step Financial Confidence™ Program

For Business Families, Business Owners and Executives

6-Step Financial Planning

OBJECTIVES

Our Six Steps to a Financial Plan:

Business families, business owners, executives and their advisors can benefit from our **6-Step Financial Confidence™ Program**. Our 6-step financial planning system builds trusting relationships, provides transparent dialogue, and addresses your needs and those of your advisors:

- To navigate all the different products and tools of retirement, tax and financial planning with ease.
- To coordinate all the options to provide you the best possible result.
- To ensure all your trusted professional advisors are informed and working towards the same collaborative goal.
- To enable you to grow your career or business, realize your retirement dreams, give back to your community, and enjoy your family and friends.

DIAGRAM



<p>STEP 1</p>	<p>Financial Planning Step 1 – Get Acquainted</p> <ul style="list-style-type: none"> • Discover who you are and what you do • Meet with your Financial Confidence Advisor • Learn what we do and how we can help • Discuss the contracting process and engagement • Ensure Financial Confidence is a good fit for you
<p>STEP 2</p>	<p>Financial Planning Step 2 – Assess Your Situation</p> <ul style="list-style-type: none"> • Review and confirm scope of services • Revisit your current personal and corporate situation • Establish personal and business-oriented goals, priorities and objectives • Discuss what is important to you • Evaluate your dangers, opportunities, and strengths • Develop a comprehensive wealth profile
<p>STEP 3</p>	<p>Financial Planning Step 3 – Assemble the Perfect Team</p> <ul style="list-style-type: none"> • Review and confirm scope of services • Financial Confidence works with your advisors, such as accountants, lawyers and other professionals, to ensure you define and achieve your goals • Multi-disciplined teams provide expert advice with ongoing evaluation to the business owner and business family • Access the Financial Confidence virtual project team for additional expertise
<p>STEP 4</p>	<p>Financial Planning Step 4 – Create Action Plan</p> <ul style="list-style-type: none"> • Review and confirm scope of services • Financial Confidence will review and organize your information • Develop a complete report to debrief regarding your financial situation and create a road map for your success • Meet to develop a prioritized action plan • Articulate the estate plan to all preferred team members for input
<p>STEP 5</p>	<p>Financial Planning Step 5 – Actualize and Implement</p> <ul style="list-style-type: none"> • Review and confirm scope of services • Confirm implementation of the estate plan and action steps • Inform all team members about the plan and provide them with action steps • Continue to regularly update multi-disciplined team and client regarding progress
<p>STEP 6</p>	<p>Financial Planning Step 6 – Annual Checkup</p> <ul style="list-style-type: none"> • Review and confirm scope of services • Review progress to date • Evaluate past dangers, opportunities, and strengths • Create updated dangers, opportunities, and strengths • Revise the financial plan to reflect new goals • Adjust financial plan as needed