



*Taking a personal interest  
in your financial well-being*

## **Journey of Financial Health™**

**You will be heard. You will be involved. You will be empowered.  
You will understand. You will be accountable.**

### **Complimentary Exploration Meeting:**

A time to get to know you and what is important to you.  
A time for you to get to know us, and our unique approach to financial life  
planning and wealth management.  
A time to discern if we will add value to your life and what the cost will be.

### **All Engagements are based on complexity and scope of service and will be determined at the Exploration meeting.**

Journey of Financial Health™ Program      Cost starts at \$3,000  
Series of 6 meetings lasting no longer than 12 months – ½ fee upfront; remainder  
on a monthly subscription

### **Journey of Financial Health™ - discount based on investments brought under our fiduciary management.**

<a href="#">Ocean</a> Service Level	50%
<a href="#">River</a> Service Level	25%
<a href="#">Stream</a> Service Level	15%

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