



*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.

<u>Ocean</u> Service Level	50%
<u>River</u> Service Level	25%
<u>Stream</u> Service Level	15%

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