



Optimizing
Financial Possibilities
—
Unfolding
Life Potential

Journey of Financial Health™

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

Introduce yourself! Set up your fifteen minute conversation
at www.wealthbydesign4u/contact-us

Getting on board for your journey starts with:

Complimentary Exploration Meeting either in person or remotely with our team:

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 discussed and mutually determined and at the Exploration Meeting.

Journey of Financial Health™ Program -- Personal investment – between \$3,000 and \$10,000.
½ upon engagement and ½ at plan delivery.

All fees are subject to negotiation at the sole discretion of WBD. Relationship will be reviewed annually for client needs, and levels may be changed annually.** more details available on <https://www.wealthbydesign4u.com/> under "Investment Management – Service levels"