



Optimizing
Financial Possibilities

Unfolding
Life Potential

Journey of Financial Health™ for Pre-retirees Or Second Mountain Journey for Retirees

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 discussion [HERE](#)
Getting on board for your journey starts with:
Complimentary Exploration Meeting via Zoom 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 at the [EXPLORATION MEETING.](#)***

Personal investment – between \$3,000 and \$15,000; ½ upon engagement and ½ at plan
delivery.

All initial fees are subject to negotiation and at the sole discretion of WBD. Advisory
services and investment management relationships will be reviewed annually for client
needs and subject to change. More details available [HERE](#)

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