EDGEAHEAD

Financial Review Contract

Regular fee: $750
Special rate for qualified referrals: $650

This EdgeAhead Financial Review includes:

Preparation for the Appointment:

- For a tax review, send in the last three years tax returns and income year-to-date (including most recent paystub(s).
- For investment review, send a list of all assets and liabilities (including most recent brokerage, bank, pension, and social security statements).
- Complete the Personal Financial Planning Profile.

- Prior to your meeting Cambridge Financial Group will research and evaluate:
  1. Prior year taxes and tax planning strategies;
  2. Investments, pensions, assets, and liabilities.

Client Appointment: Your two-hour meeting may cover these topics, as time permits:

1. Review of prior returns for missed deductions
2. Tax planning for current year
3. Recommendation of possible tax strategies to consider
4. Review of current asset allocation and investment location
5. Evaluation of performance of current investments
6. Review of Financial Life Cycle position
7. Retirement/Financial Independence Analysis
8. Recommendation of holistic financial strategy
9. Analysis of current costs being incurred for financial advice
10. Other related topics to include business planning, estate planning recommendations, insurance review, budgeting and/or goal setting.

When making your appointment, please let us know the three most critical areas you will want to cover. You will leave the appointment with a written list of recommendations and specific options. You are then free to implement them yourself or through another financial advisor. There is no further obligation on your part or on Cambridge Financial Group's part.

If you are considering becoming a full retainer client, this Financial Review is an excellent starting point. The full amount paid for the Financial Review will be applied against the initial retainer if you decide to become a regular client within thirty days.

No tax preparation or investment implementation is included in the Cambridge Financial Review. It is important to note that this Financial Review is *not* a full financial plan. It is a brief overview of your financial progress and a review of limited aspects of your financial situation.

To set an appointment, call Cambridge Financial Group at 520-531-0550 or 888-705-5692. Appointments are generally scheduled within 4-6 weeks. If you have an urgent issue or have questions about this program, we will set up a telephone appointment for you to talk to an Advisor.

Payment: The full fee is due at the time of the appointment. We accept check, Visa, MasterCard, and Discover.

I have read the above and agree to the terms.

________________________	________________________	________________
Signature	Signature	Date

Amount Paid: __________ Date: __________ Received By: __________