# Financial Breakaway Blueprint

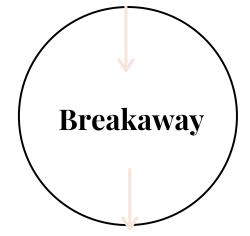
There is a situation in ice hockey in which a player with the puck has no defending players, except for the goaltender, between themselves and the opposing goal, leaving them free to skate in and shoot at will.

We want our clients to have that feeling in their financial life... free from the confusion of the financial world, a clear path to their goals, and the tools necessary to achieve them. We work to find that "breakaway" moment.

- 1. Discuss goals & gather data
- You want to retire when?
- Move to Florida?
- Buy that boat?

- 2. Analyze & evaluate current status
- Now we do homework
- Consider the different paths to accomplish your goals

#### 3. Develop Breakaway strategy



- This is the moment we work towards
- An 'aw ha' moment
- Start to see that goals are reachable

## 5. Implement

- We put the strategy to work
- Set up the tools necessary to reach goals

#### 6. Monitor

- Review plan quarterly
- Optimize where necessary

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