

Plan ahead, make the most of your wealth.  
Efficient Wealth, like anything that is purposeful and thorough,  
needs a proven process to succeed. Here's our process.

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### EFFICIENCY TEST

How prepared are you to explore 100% efficiency.

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### UNDERSTANDING THE ISSUES

What is your single most important issue to solve right now? What are the implications of not solving? What would you like to see happen?

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### WEALTH SOUNDING (PERSONAL AND/OR BUSINESS DISCOVERY)

Tell us about what is important to you, your values, financial situation, successes and business.

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### ESTABLISH PARAMETERS & EXPECTATIONS

Setting expectations for addressing issues, finding solutions and building a highly valued professional relationship.

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### DYNAMIC STRATEGY

Summarize issues, opportunities, recommendations and implications that grow with you.

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### ONGOING MANAGEMENT & REVIEW

Continuously preparing for change before change happens.

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### IMPLEMENTATION

Following through with strategies and executables.

