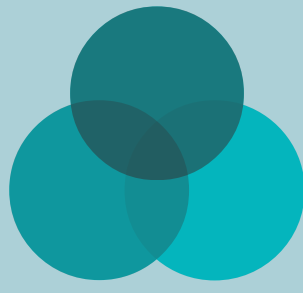


# THE HAWS FALASCO GROUP

Educated Experienced Compassionate Guidance  
More Than Investment Strategy - We Listen



## How We Work Together:

### 1. ESTABLISH & DEFINE



Establish & defining your goals to determine how we can work together

- *Saving for Retirement*
- *Liability Management*
- *Asset & Risk Management*
- *Leaving a Legacy*
- *Charitable Giving*

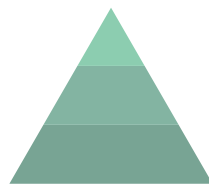
### 2. GATHER INFORMATION



Providing us with pertinent documents helps us see your whole financial picture

- *Financial Statements*
- *Estate Documents*
- *Pension Plans*
- *Social Security Statements*

### 3. ANALYZE & RECOMMEND



Analyze your current situation and make recommendations to help you meet your goals

- *Asset Allocation Plan*
- *Insurance Needs Analysis*
- *Debt Repayment Plan*
- *Business Succession Planning*
- *Cash Flow Projections*
- *Estate Plan Reviews*

### 4. IMPLEMENT



Implement recommendations to keep your financial plan on track

- *Rebalance Investments*
- *Establish a Budget*
- *Meet with Attorney or CPA*
- *Update Legal Documents*

### 5. MONITOR & REVIEW



Working as a team to monitor your progress and keep the lines of communication open

- *Quarterly Investment Review*
- *Periodic Asset Allocation Rebalance*
- *Annual Goals Review*