



FIVE OCEANS
ADVISORS

2021 Client Experience

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2021 Client Experience



Life Strategy Review

Goal planning session with a Life Strategist covering your own personal five oceans

Career | Finance | Health | Relationships | Fun

Annual Five Oceans Virtual Symposium for Entrepreneurs

Curated content designed to enhance an entrepreneur's business and life

Jan/Feb

Apr/May

July

Oct/Nov

Financial Review

Deep dive financial review and strategy meeting

Tax | Insurance | Estate | Investments

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** This is our proactive client experience calendar but we're always available throughout the year if something comes up.*