



A different way to approach
your financial life:

*The Personal CFO
perspective.*



www.innovativeplanning.com

Financial decisions are *rarely* isolated.

An investment decision can
impact your taxes.

A business decision can shape
your long-term plan.

A life change can influence
everything.



**But those conversations
don't always happen
together.**

Planning, investments, tax, and business
decisions are often addressed separately
—
making it harder to see how each piece fits.



A more connected way to plan:

We bring a *Personal CFO* approach
coordinating across

–

financial planning
investments
tax planning
& business strategy

–

so your financial life is viewed as one
connected picture, not separate decisions.



*Where coordination
matters most.*

**Across life, family, and business decisions —
we help ensure each piece is considered in
context of the others.**

