



NORTHSTAR
FINANCIAL PLANNING

Financial Well-Being Starts Here

*Live the life you desire
by taking control
of your financial well-being.*

What Is Financial Well-Being?

Financial well-being is a whole-person experience—part mindset, part math.

- ⌚ What you can **measure**: Income, Spending, Savings, and Net Worth
- ⌚ What you **feel**: Peace of Mind, Confidence, and a Sense of Security

Both are essential. Together, they create financial clarity, personal freedom, and a deeper sense of purpose.

The 6 Aspects of Financial Well-Being

At Northstar, we go beyond the numbers. We guide you through six key areas:

1. **Cash Flow** *Is your spending aligned with what matters most to you?*
2. **Family** *How does money affect your roles, relationships, and responsibilities?*
3. **Wellness** *Is your financial life supporting your overall well-being?*
4. **Net Worth** *How do you define your worth, by a number or by what it enables you to do?*
5. **Vision** *Are your finances helping you move toward the life you envision?*
6. **Security** *Do you feel protected and prepared for the unexpected?*



Financial Well-Being Starts Here

Live the life you desire by taking control of your financial well-being.

Why It Matters

When your finances feel uncertain or out of sync with your values, it can impact nearly every part of your life:

- ❖ Your mental and emotional well-being
- ❖ Your relationships with family and friends
- ❖ Your career choices and life goals
- ❖ Your sleep, health, and sense of self-worth

Financial stress isn't just about money; it's about the way it shows up in your life.

How We Help

We provide holistic financial planning designed around you - your values, your goals, and your life. Whether you're navigating a major transition or simply want greater control and clarity, we're here to help:

Set and protect your long-term goals

Reclaim control by aligning your wealth with your life's purpose

Feel empowered to focus on what matters most

*You deserve more than financial success.
You deserve financial well-being. Let's build it—together.*



Northstar is a fiduciary Fee-Only Wealth Management firm with a dedicated team of professionals.

Call us for a complimentary consultation today.

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