

Without a Financial Model

Does your financial plan look like a junk drawer?

May result in assets that are:

- › Uncoordinated
- › Non-Integrated
- › Based on Opinion
- › Limited to Needs
- › Limited to Goals
- › Purchased by Convenience
- › Disorganized
- › Not Accessible



- This looks and feels like my situation
- This looks partially like my situation
- My finances are completely organized

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