

## 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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