

The NextPhase™ Planning Process

Step One

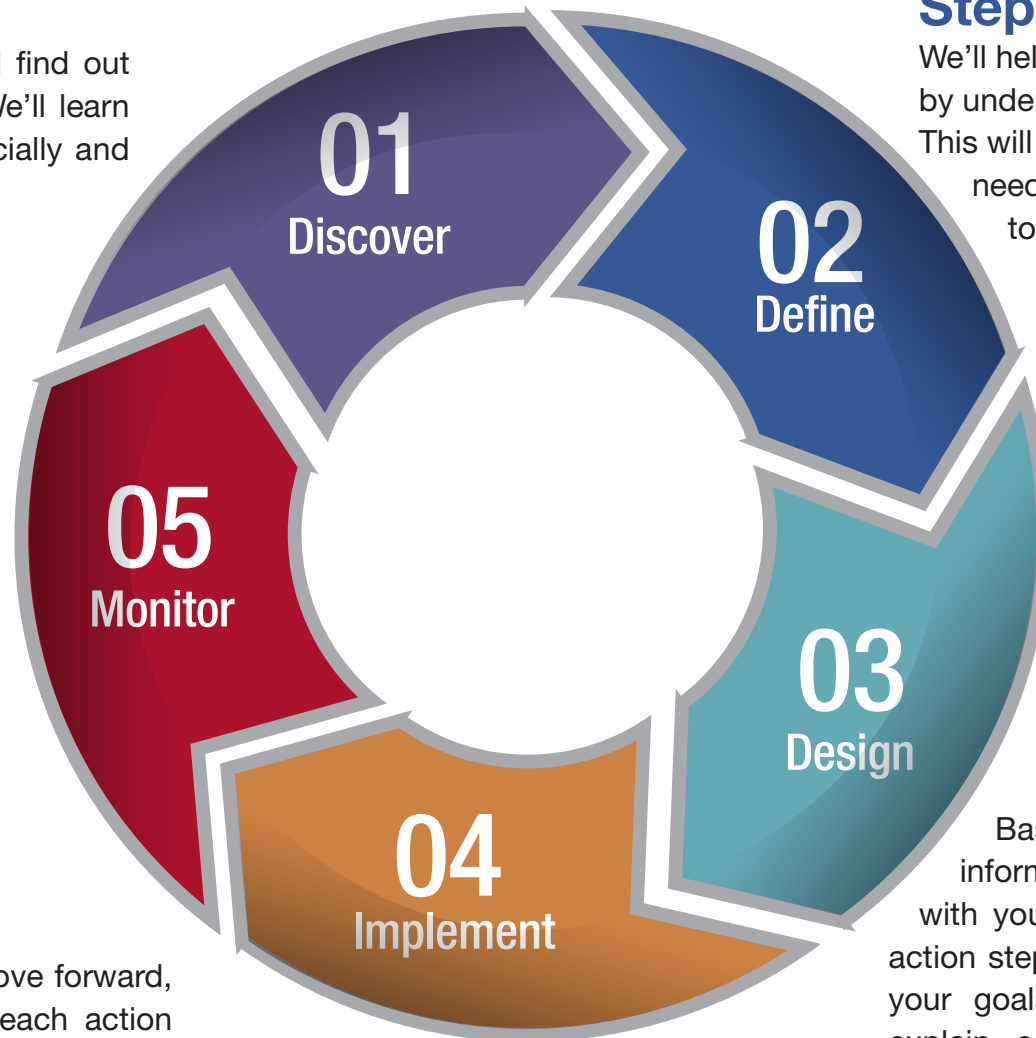
We'll get to know you and find out what's important to you. We'll learn where you are in life financially and when you expect to retire.

Step Five

We'll monitor your overall situation and make recommended changes when necessary and regularly report your progress toward reaching your goals.

Step Four

Once you've decided to move forward, we'll help you implement each action step by working with you and other professionals.



Step Two

We'll help you define your goals in writing by understanding your personal priorities. This will help us determine how much you'll need to produce a lifelong income stream to support a successful retirement.

Step Three

Based on the personal and financial information we have gathered combined with your personal goals, we'll put together action steps we recommend to help you reach your goals. We'll present our proposal and explain each step so that you completely understand your options.