

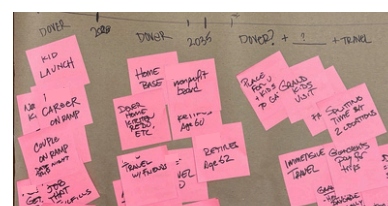
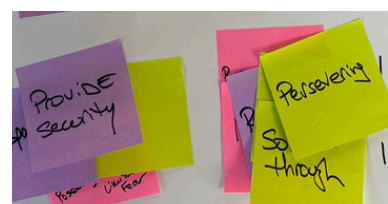
LifePlan Process

Financial advisors are experts in building sound financial strategies but clients need clarity about what they want from the future before advisors can build a plan. However, most clients don't have a clear picture of their future, and struggle to articulate their life vision in a way that translates into financial decisions. That's where the LifePlanning process comes in – clients gain clarity on their future so you can design a financial plan they truly love and actually will follow through on.

The Process

Three, 2-hour facilitated sessions with ~1 hour of 'homework' before each session.

- **Session 1:** To become more aware of and immersed in what matters most. From this we identify **VALUES**.
- **Session 2:** To identify themes that will guide their future as well as how they want their life to change over time. From this we identify **GUIDING PRINCIPLES** as well as **LIFE STAGES**.
- **Session 3:** To understand what gaps exist between now and where they want to be. Lean into ownership of what needs to happen next. From this we identify **ACTION STEPS**.



The Outcome

Couples are aligned, inspired, and action-oriented. The future is now something they look forward to with clarity and excitement.

They are ready to make commitments and work with key partners – financial advisors, doctors, colleagues – to live out their dreams.

