



## DIVERSI-PLAN

Diversi-Plan was designed to give you the tools needed to help your assets grow in an effective and efficient manner. It also provides you with the knowledge to better protect, preserve, and distribute your assets according to your goals. Our proven process provides our clients with a plan that is both comprehensive and fitting to their goals for their future. By doing so, we provide our clients with the peace of mind they desire.

### DIRECTION REVIEW

### STRATEGIES & SOLUTIONS

### FINANCIAL DISCOVERY

### PLAN EXECUTION

### VISION & GOALS

### DIRECTION REVIEW & REFOCUS

#### VISION & GOALS

All planning must start with understanding, and defining your goals and objectives. This provides focus, purpose, vision, and direction for the financial planning process. It is important to establish clear, and measurable goals and objectives.

#### FINANCIAL DISCOVERY

Financial Discovery is the process of understanding your current financial situation. We will help you take an inventory of your current financial resources, opportunities, and obligations.

#### DIRECTION REVIEW

Direction Review is the process of analyzing your current situation, and determining if you are heading in the right direction to achieve your *vision and goals*? This could include analyzing your assets, investments or tax strategies, cash flow, current insurance coverage, or even liabilities.

#### STRATEGIES & SOLUTIONS

Recommendations and solutions that address your vision and goals will be made available to you, based on the information you provide. These ideas supply flexible solutions that will grow with you.

#### PLAN EXECUTION

This is the agreed upon course of action that makes the most sense for you.

#### DIRECTION REVIEW & REFOCUS

We understand that your vision and goals may change with time. Therefore it is important to review, and adjust your strategies as your life changes.