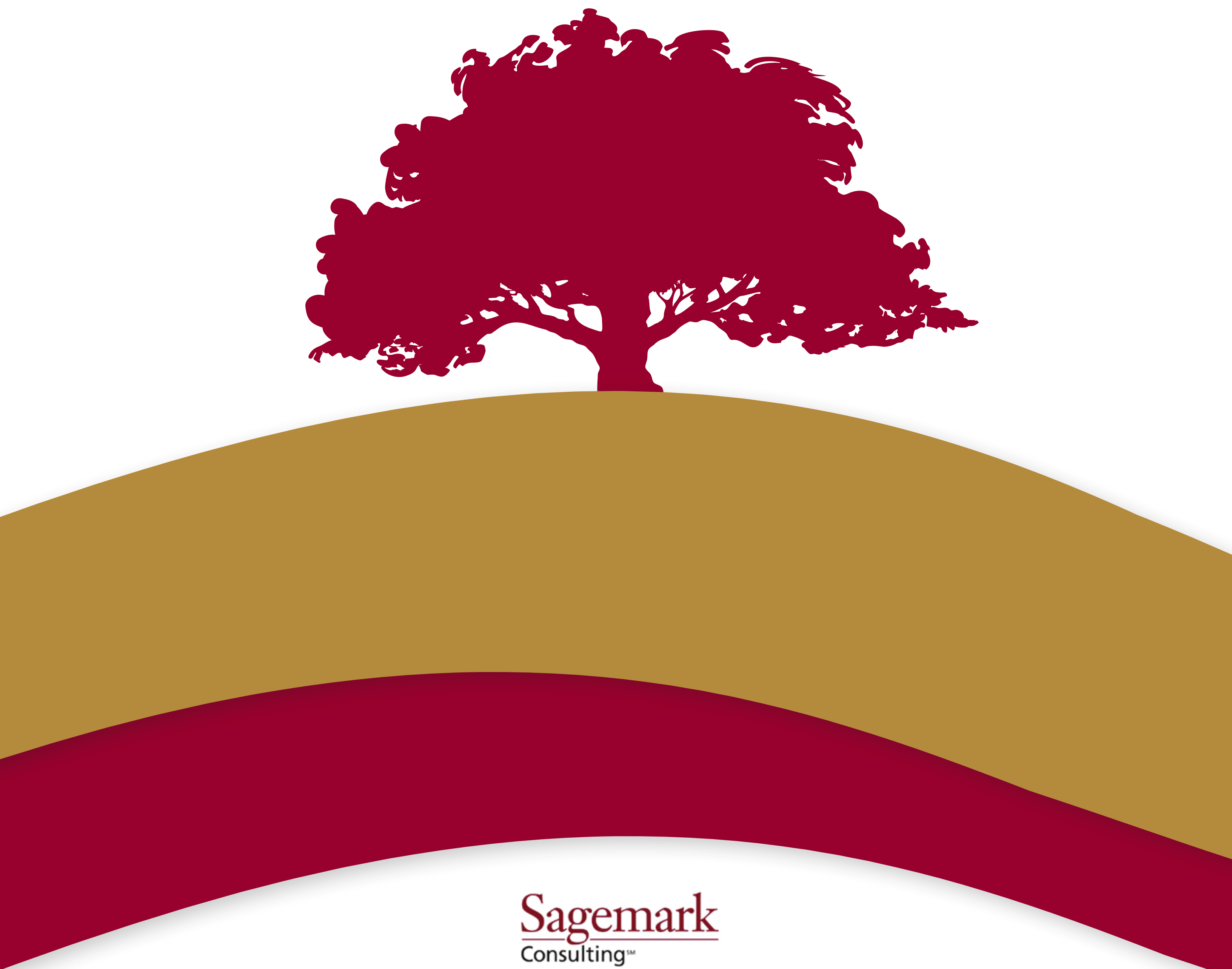
Your Financial PATHWAY

A Process for Independence and Control in the Future



Sagemark Consulting℠

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Your Financial Pathway

Let's navigate your financial future together

The path towards your financial future requires a clear vision, a detailed plan, and a dynamic team. Taking every factor of this important process into account, we construct an easy to follow map toward building and retaining wealth. Our innovative approach includes estate planning, investment strategies, and retirement planning.

Phase One
Your Ideal Future

- We learn about your current and past financial history.
- You share your concerns and goals for the future.
- We decide if there is a good fit in us working together.

Phase Two
Your Vision Clarifier

- Based on our understanding of your goals and current situation, we will present an overview of our financial assessment.
- A decision is made regarding moving forward with the planning process.

Phase Three
Your Solutions' Filter

- We discuss your vision for the future.
- We identify the obstacles that may prevent you from reaching your goals.
- We offer possible solutions to help achieve your goals.

Phase Four
Your Solutions' Springboard

- Once solutions are agreed upon, we will begin to implement your plan.
- We will communicate with your current advisors to help coordinate your plan.
- The result is a well thought-out plan with a specific timeline to implement the solution.

Phase Five
Your Pathway's Progress

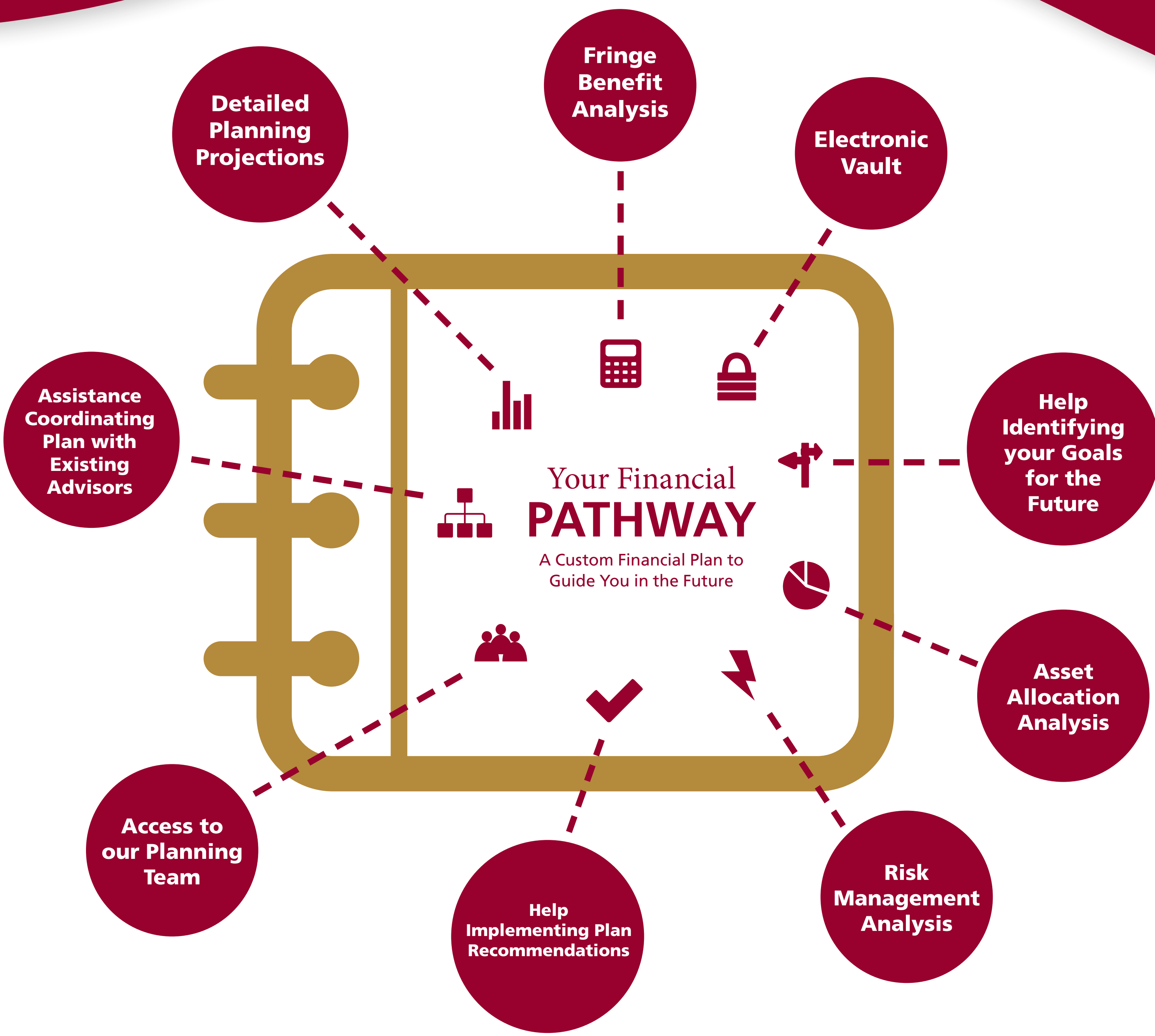
- We regularly review your plan to update your goals and ensure you are on track.
- Necessary changes are made to your plan.
- We discuss an action plan to implement your changes

We work together to determine your unique personal and financial goals.

Accumulation Strategies
Build Your Wealth

Retirement Planning
Enjoy Your Wealth

Parent Care 360
Preserve Your Wealth



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Andrew L. Comins, CLU, ChFC, MSFS
Lincoln Financial Advisors Corp.
200 Meridian Centre Blvd., Suite 150
Rochester, NY 14618

Phone 585.350.7235
Toll Free 800.488.2482
Ext 7235
Fax 585.350.7788

Web www.cominsplanning.com
Email Andrew.Comins@LFG.com