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PURPOSE PROCESS PROTECT

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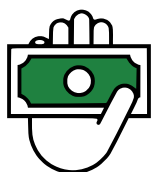
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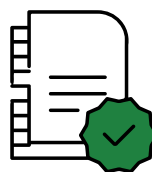
PROCESS



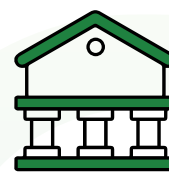
Financial Picture -
Taxable,
Tax Deferred,
Tax Minimizing



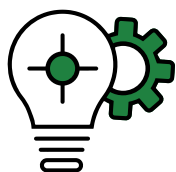
Cash-Flow



Tax
Profile



Banking



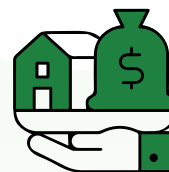
Strategy
Development



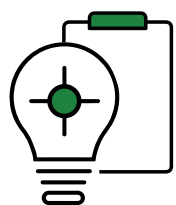
Priority -
Growth,
Income,
Safety



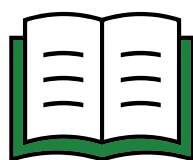
Purpose of
Each Account -
Accumulation, Income,
Preservation, Legacy



Life stage -
Working,
Transition,
Retirement



Strategy
Explanation



Education



Guidance & Dialogue
Review, Evaluate,
Action



Monitor