



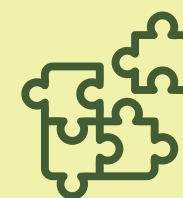
Step 1 Personal Discovery

We gather your financial information and measure your tolerance for risk, while discovering your current net worth strategies, goals, strengths, and concerns.



Step 2 Graphic Overview

We create and review with you an analytical report of your portfolio's current status, including asset allocation, sector weightings, and the effects it has on your net worth.



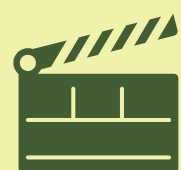
Step 3 Strategy Design

We develop a financial strategy designed to bring together all of the resources appropriate for your portfolio.



Discover our unique six-step process The Net Worth MaximizerTM

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Step 4 Action Strategy

We help you develop and execute a plan for implementing the portfolio strategy unique to your individual objectives to help maximize your net worth.



Step 5 Analytical Observation

We work with you to monitor your success in meeting the goals and objectives of your individual strategy.



Step 6 Net Worth Measurement

We review with you the progress of your portfolio versus your goals based on appropriate benchmarks.