



Financial Life Planning Sound Bites

- Financial Life Planning initiates a discovery process that allows you to gain a better understanding of your true life goals and desires.
- For the Financial Life Planning professional, the life of the client is the axis around which financial discussions revolve and evolve.
- Financial Life Planning is simply a matter of broadening our conversations from asset management to life management.
- I assist clients in the process of establishing financial objectives that facilitate their life goals.
- My process results in a financial portfolio that is built around high levels of client self-awareness and advisor understanding.
- As a Financial Life Planning professional, my goal is to connect your money to your life.
- Who you are and what you care about is of paramount importance to the work we do together. My process allows me to get to know you in a meaningful way.
- Financial Life Planning involves an in-depth data gathering process, of both qualitative and quantitative information, that fully engages the client's heart and mind.
- The Financial Life Planning process will help you define and design your unique version of "the rich life."
- My Financial Life Planning process will help you get to the heart of your values and priorities, and create a framework to align your financial plan with your life goals.