

Financial Fitness Review

Standard Fee: \$900

HOLIDAY SALE: \$750.00

Offer valid through January 31, 2012

Jump start your New Year by achieving financial health, well-being and peace of mind!

With a **Financial Fitness Review**, we will conduct a thorough analysis of your finances and identify key areas that need the most attention. After sitting down with you to better understand your concerns, fears, goals and aspirations, our team will deliver customized recommendations that are specifically tailored for you.

Over two meetings we will:

- Analyze your progress toward achieving the Five Fundamentals of Fiscal Fitness.
- Conduct an analysis of your net worth and an evaluation of your progress relative to financial life-cycle benchmarks.
- Review your current investment portfolio.
- Shed light on the costs (expenses) you currently incur in your current investment portfolio.
- Review up to three additional financial planning topics as requested and agreed upon during the first meeting.

We will never sell you any financial products, and our advice is independent. This means that all our recommendations are in your best interests and your interests only!

Don't let another year go by without getting control over your personal finances. The **Financial Fitness Review** is a great way to get your 2012 pointed in the right direction.

Don't Grow It Alone. Let's Grow Something Together!

Make your appointment today:

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