THE EMPOWERED SOLUTION

1

IS THE EMPOWERED SOLUTION RIGHT FOR YOU?

Meet the advisor and learn more about them and our Empowered Solution process. Your advisor will ask questions to learn more about your situation, goals, risk preferences, budget, and more. Discover if our process is the right fit for your situation.

2

REVIEW YOUR CURRENT PORTFOLIO

The advisor will dive deep into your portfolio and current income plan. They will evaluate it compared to your risk tolerance and the retirement goals you discussed in your prior appointment. You decide if you are moving forward through Empowered Solution.

3

IMPLEMENTATION

Your income plan, investment plan, health care plan, and tax plan will be created, reviewed, and implemented. This generally occurs over two appointments.

4

PREPARATION FOR RETIREMENT

You and your advisor will create a budget that identifies how much you need to continue saving for retirement to meet your discussed financial goals. Also review future retirement planning events, establish a legacy plan, beneficiary benefits, educational opportunities, and more.

5

REVIEW & WEALTH VAULT

Review what you have accomplished, receive your in-force policies, ask any questions you might have, and set up your Wealth Vault account. Learn how to use your Wealth Vault and add your new and current financial accounts so you can monitor your entire financial picture. Congratulations! You are officially part of our family!

6

FAMILY MEMBER

Regularly speak or meet with your advisor to review, maintain, and evaluate your portfolio. You will continue to build a relationship with your advisor, discuss economic events, enjoy fun “family events”, and receive continued servicing from our staff.

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