# 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 visit. You decide if you are moving forward through the Empowered Solution process.

3

## IMPLEMENTATION

Your income plan, investment plan, health care plan, and tax plan will be created, reviewed, and implemented. This occurs over several visits, and each step provides an in-depth analysis and plan to help ensure you are fully prepared for every aspect of retirement.

4

## WEALTH VAULT

Set up your secured and complimentary Wealth Vault client portal, learn how to use it, and add both your new and current financial accounts so you can monitor your entire financial picture – instantly! This will give you in-depth analysis and an immediate look at your entire portfolio, complete with reports and budget planning!

5

## PREPARING BEYOND YOUR FINANCIAL PORTFOLIO

Go beyond your financial portfolio, and truly be holistically prepared for yourself and your beneficiaries. Create further budgets for both before and after retirement, discuss in-depth contribution plans, meet with a team of estate planners to update or create your legacy plan, work with tax attorneys, establish special requests you have for your advisor, begin planning and working with your beneficiaries, plan educational opportunities, and more!

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.

8383 GREENWAY BLVD., SUITE 210 | MIDDLETON, WI 53562 | 608-212-7300
EMPOWEREDFINANCIALMANAGEMENT.COM