

### PROCESS OUTLINE

#### STEP 1 - Analyze Current Position

- A. How Are Your Assets Invested Today
- B. Determine Your Current/Future Needs
- C. Discuss Your Goals

#### STEP 2 - Formalize Investment Strategy

- A. Determine Type of Investments That Meet Your Goals
- B. Develop Strategy
  - Income, Growth and Income, Growth, Aggressive Growth
- C. Risk Tolerance
  - Conservative, Moderate, Aggressive

#### STEP 3 - Implement Strategy

#### STEP 4 - Monitor Results

#### STEP 5 - Review and Rebalance

### OUR PROCESS

