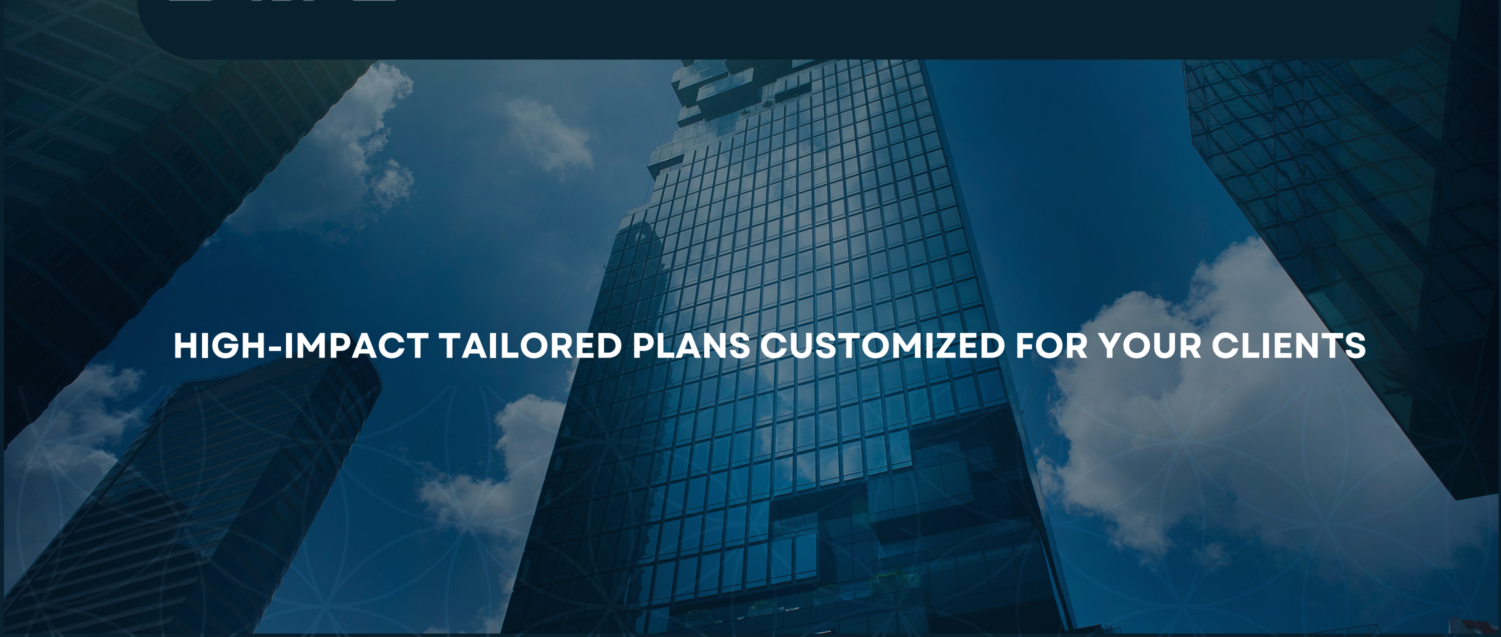
PREMIER WEALTH MANAGEMENT
POWERED BY THE FIVE F'S



FINANCIAL PLANNING PROGRAM

Our 7 step process allows the planner to check in with the advisor as the process takes place. The final revision occurs after the advisor meets with the client and then iteration 3 can be created if any changes are needed. This process makes it easy to turn complex plans and financial data into a clear and simple picture with powerful itneractive visuals and repoorts.

01 Core

-1 Hour Consulting Call
-30 Minute Review Call
-Annual Plan Review*

02 Comprehensive

-1 Hour Consulting Call
-30 Minute Review Call
-Annual Plan Review*
-Access to Plan Manager

03 Advanced

-1 Hour Consulting Call
-30 Minute Review Call
-Annual Plan Review*
-Access to Plan Manager
-Cash Flow Analysis
-Asset Map