Wealth Wellness

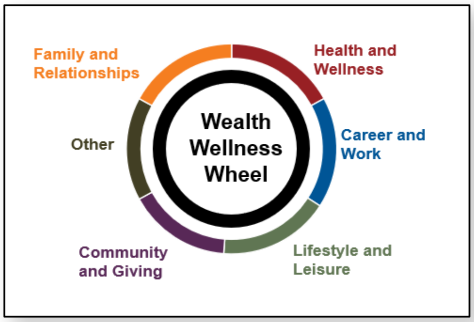
Discovering what's important to build a plan that is right for you and your family

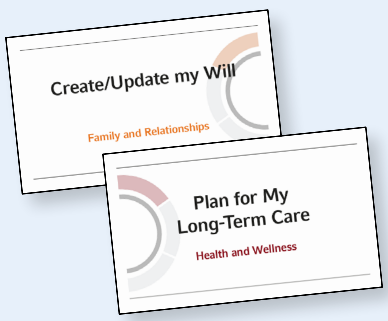
Russell Investments

Planning for when "life happens"

Change is constant and often requires us to shift our priorities, adapt to different circumstances or target new goals. In that state of flux, it's easy to lose sight of the financial impact these changes may have not only on us but on our families too.

Our interactive discovery process focuses on the 5 areas of your life that have financial implications: Family and Relationships, Health and Wellness, Career and Work, Lifestyle and Leisure, Community and Giving. Together, let's get crystal clear about what – and who – matters most to you and your family.





What to expect during the conversation

The conversation may sound a little different from past discussions we've had or that you have had with other advisors. It may feel like you are oversharing at times, and it may even make you feel a little vulnerable.

Understanding what's most important to you will enable us to prioritize what we need to accomplish with your wealth plan and ensure that nothing is missed.

Our discovery process is designed to help spark conversation about your Wealth Wellness priorities, hopes and concerns.

What the process looks like

Step 1: Identify

We will take you through an engaging exercise to identify your goals, hopes and concerns for you and your family.

Step 2: Prioritize

We will focus on the top three priorities that are most important to you today.

Step 3: Communicate

Our conversation will go deeper, working on both individual and family priorities you identified.

Step 4: Implement

We will work together to design a plan that is right for you and those you care about.

Topics of discussion

Many times, clients are unsure what we need to know to create a personalized plan for them. That's why our Discovery process is designed to understand all the components of your life and the financial impact that the day-to-day decisions may have on the long-term health of your wealth.

Family and Relationships

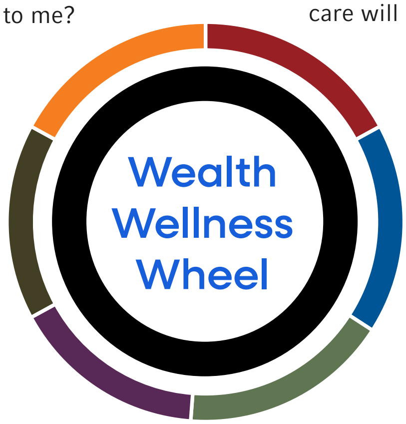
We will explore topics around family decisions such as who will be ultimately responsible for anyone else financially? Who would care for my family if something happened to me?

Health and Wellness

Health and wellness have certainly taken center stage recently, with many people overhauling their life to focus on these goals. Topics around well-being and self-care will be addressed in this category.

Other

We recognize that everyone is unique and there may be passions or projects that you would like to pursue that fall outside of the previous 5 categories. If that is the case for you, we will take the time to explore these priorities further.



Career and Work

You or your partner may be considering starting a new career, becoming self-employed or want to be prepared for unforeseen employment status changes. You may be focused on protecting your business for the next generation.

Community and Giving

It is not uncommon for people to want to contribute to their communities either by actively engaging or leaving a legacy to support the cause. If this is a priority for you, we will explore some of these topics.

Lifestyle and Leisure

Your lifestyle and the way you choose to spend your time is so much more than having the income to cover your expenses. This category focuses on the things that will enable you to live the life you desire.

How often should we have this conversation together?

It's natural for our priorities to change over time, so we typically suggest having a Wealth Wellness conversation together every 12-18 months. Of course, if there is a sudden change in your goals, circumstances or preferences, please let us know immediately so that we can evaluate potential adjustments to your long-term plan and keep you on track to maximizing the long-term health of your wealth.

We are listening.
Let us be your guide.

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