

The One Page Planning Process™

A complimentary 4-step process to help potential clients evaluate our services and firm to make an informed decision about working together.



Schedule a 20-min call

A 20-minute phone call will give us both a chance to make sure your situation matches our expertise.



Discovery Meeting

The next step is to meet with our team (in-person or virtually). During this 1 hour meeting our team will get crystal clear on your current financial situation and your future goals.



Analysis & Design

We will apply our knowledge and expertise to your situation and develop a one page financial plan .



Review Analysis

With our analysis complete, we will have a second meeting to review our findings. In plain English, we will explain exactly what you need to do to reach your financial goals.

The process results in a personalize One-Page Financial Plan offering insight into your current situation and some key action items to move you towards your financial goals.

[Click Here to view a sample One-Page Plan Assessment](#)