

THE FINANCIAL PLANNING PROCESS

- 1 Establish Core Values and Financial Goals
- 2 Gather Financial Information
- 3 Analyze Information and Create a Financial Plan
- 4 Present Plan and Advise on Strategies
- 5 Implement Financial Planning Strategies
- 6 Review Progress

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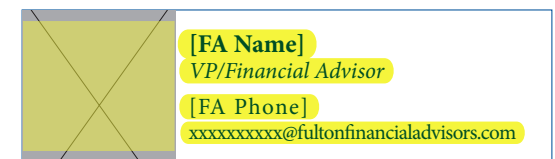
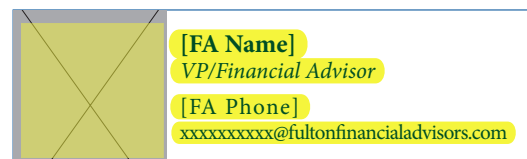
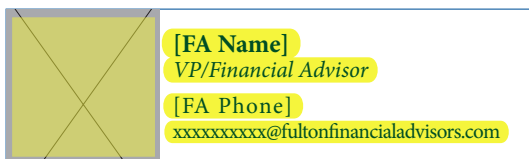
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