

# The RISE Process™

We Live Where Life Meets Money

# RISE

Step One  
Step Two  
Step Three  
Step Four



## Right Fit-Right Vision

Our process begins with an exploratory conversation to make sure we would be a good fit to work together. From there, we develop a clear vision of the life you would like to live, why it is important to you, and what impact finances have on it.



## Initial Analysis

Once your vision is clear, we gather the data needed to prepare a projection of your current financial situation.



## Strategy

Our job is not to tell you what to do with your money, our job is to show you what is possible and the impacts of your decisions. We model changes that will give you a clear definition of what is possible and identify any roadblocks that may exist.



## Execution

Using our guided implementation process, we help execute on the changes that need to be made.

## Audit and Adjust

The one guarantee in life is that there will be change. We will audit and adjust your plan accordingly during our ongoing communications throughout the year.

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