

# The Individual Advocacy Process™

## STEP 1:

### Discovery Process™

Each client is driving towards having **One Best Financial Life®**. Our **Money Mind®** tool helps you and our planners understand how you think/feel about money. By incorporating **Honest Conversations®**, we get clarity about what a desired lifestyle looks like and what matters to you.

## STEP 2:

### Wealth Confidence Report™

Objective analysis leading to your **Funding Score** and understanding what deliberate action can be taken to help you stay on track towards your goals.

## STEP 3:

### Data Navigator™

A compilation of additional personal and financial data to get an accurate picture of today's finances.

## STEP 5:

### Client Guidebook

We only have **One Best Financial Life®**. Our process assures continual status checks towards existing goals and the development of new opportunities. We incorporate our industry-leading tools, Client Portal and **Guidecenter™**, to provide clients on demand access to their entire financial life whenever and wherever they need it.

## STEP 4:

### Wealth Builder Blueprint™

Introduction of your present plan and where you are today. By using our deeper analysis of specific financial goals, we develop a blueprint of steps to make improvements in your plan by creating your **Priority Action List**.

## STEP 4C:

### Tax Efficiency Formula™

Review aspects of the financials to assist in minimizing current and future taxes.

## STEP 4B:

### Investment Portfolio Optimizer™

Use of EisnerAmper's professional tools, including our **Investment Viewfinder®** empowers our collaborative approach, helping you understand investment trade-offs and formulate priorities. Results lead to a customized portfolio tailored to the unique preferences of each individual.

## STEP 4A:

### Protection and Estate Solutions™

Identifies and evaluates the risks to family and business of unforeseen and unplanned events.

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