# The Individual Advocacy Process™

#### STEP 1:

### Discovery Process<sup>™</sup>

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<sup>™</sup>

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:

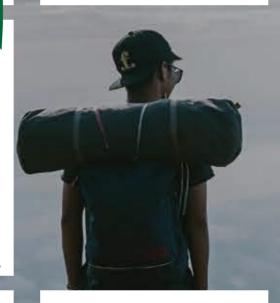
## Data Navigator™

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<sup>™</sup>

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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WEALTH MANAGEMENT CORPORATE BENEFITS