



Step 1:

INTRODUCTION

- **YOU and your federal Benefits**



Step 2:

DISCOVERY

- **Homework**
- **Goals / Concerns**
- **Advisory Agreement**



Step 3:

SOLUTIONS

- **Wealth Management**
- **Asset Protection**
- **Universal Strategies**



Step 4:

IMPLEMENTATION

- **Action Steps**
- **Plan Adoption**



Step 5:

REVIEW

- **45 Day Review**
- **100 Day Review**



Step 6:

ONGOING SUPPORT

- **Communication**
- **Monitoring**

