

PERSONAL FINANCIAL PLANNING

YOUR WEALTH SHOULD BE ALIGNED IN SUCH A WAY THAT IT ENABLES YOUR LIFE, NOT THE OTHER WAY AROUND

As a Financial Adviser with Eagle Strategies my focus is Advice... turning everyday information into well designed custom-tailored strategies that “fit you”. I help you to crystallize what you want to accomplish from a family, a business, and an estate distribution standpoint. I spend most of my time understanding what’s important to you, not promoting “the product of the day”.

GUIDING YOU IN THE RIGHT DIRECTION MEANS THAT WE DON’T TAKE UNNECESSARY SHORT CUTS, AND RISK GETTING YOU LOST ALONG THE WAY.....

I will help you take an in-depth look at where you are today, and where you want to be tomorrow. Financial planning should be a dynamic on going process that accommodates changes in your goals and circumstances, your life transitions, changes in the tax law that impact your plans, as well as changes in the financial market place.

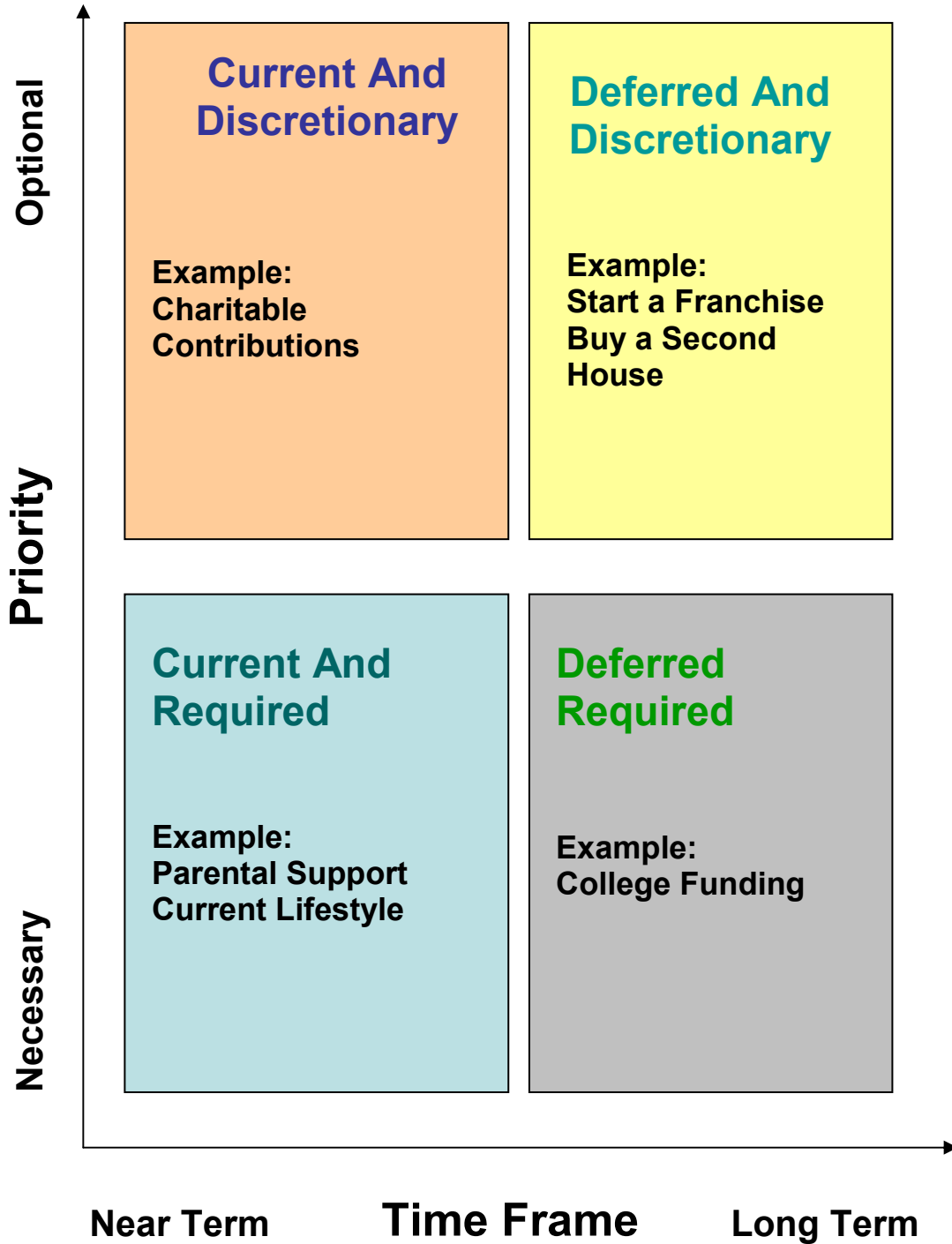
ULTIMATELY, MY GOAL IS TO HELP YOU OBTAIN A SENSE OF PERSONAL AND FINANCIAL WELL BEING, REGARDLESS OF HOW SIMPLE OR COMPLEX YOUR NEEDS MAYBE.....

Because I offer an objective, fee-based approach to financial planning the solutions I recommend and the strategies you decide to implement will depend upon your personal circumstances and objectives. I will help you to clarify your goals by timeframe and priority, helping you to understand what needs to be done to achieve them. I will provide you with alternate scenarios depicting the options you have; and I will help you to clarify the direction you want to take.

I WILL TAKE CARE OF YOUR BUSINESS AS IF IT WERE MY OWN.....

I am committed to meeting your financial planning needs including those of your family, and your business. I will be there for you in the future, providing on going communication regarding your financial planning. I will be careful to listen to what you have to say, because I feel it is more important than what I have to share with you. Once I am clear on what you want to accomplish, my job is to help see to it that it gets done.

GOALS BY TIME FRAME AND PRIORITY



FINANCIAL PLANNING MAY BE DONE IN THREE PHASES

- Phase One - Financial Plan Development
- Phase Two - Implementation of Financial Planning Recommendations
- Phase Three - Planning Update and Revision

