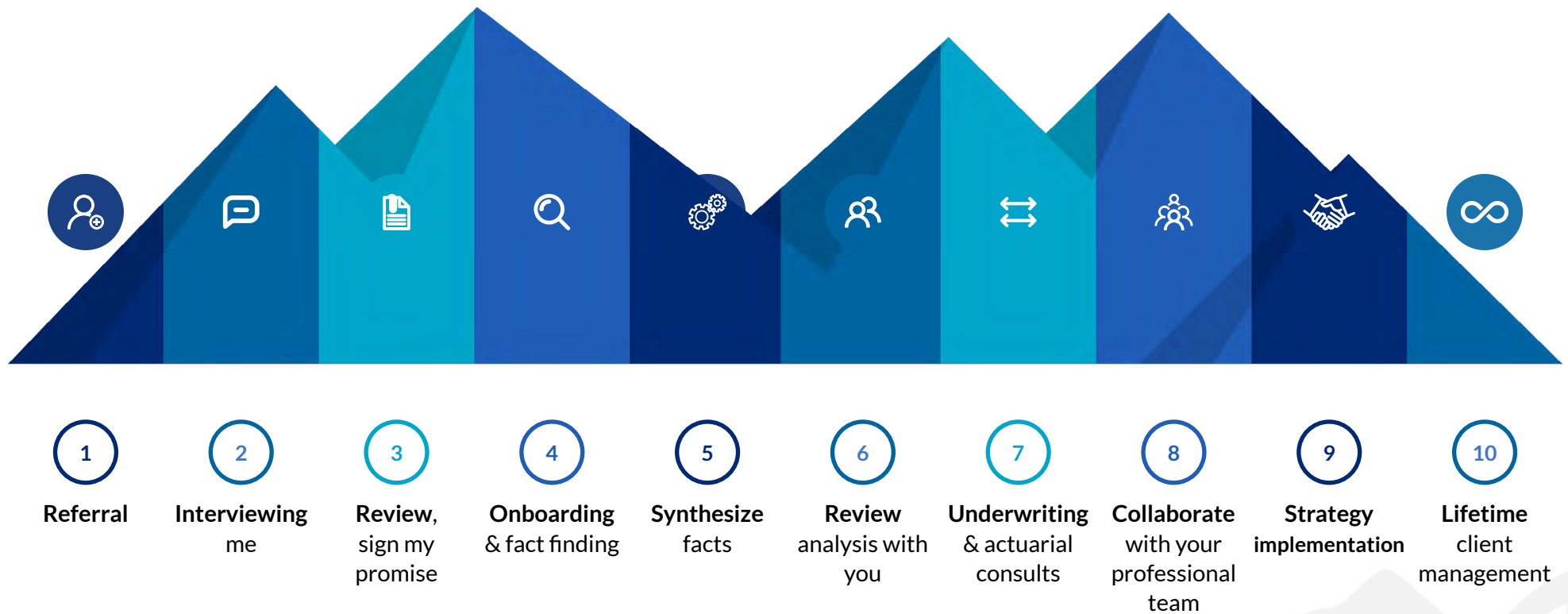




My process aims to earn my client's trust



Note: see next page for details regarding each step.



Step 1: Referral

My favorite referrals come from simple word of mouth. There is no bigger complement than a client or referring accountant or lawyer recommending my services.



Step 2: Interviewing me

Trust and respect are earned and not given. This best describes this stage as we get to know one another. Our journey together requires exchanging sensitive information. It is important you get to know the person you will entrust with your medical, financial and occupational history.



Step 3: Review, sign and witness my promise

You feel comfortable moving ahead and working together. This stage contractually binds my promise to disclose the scope and purpose of our work together. This will include how I am compensated, who I am contracted with and most importantly outline my privacy policy, cyber security, and compliance standards.



Step 4: Onboarding & fact finding

Close to 100% of my process has been digitized for client ease and convenience all while ensuring private, secure data transmission. Data collection consists of primarily tick boxes with convenient text fields. Once complete, simply follow the embedded link on the form to submit via encrypted file share.



Step 5: Synthesize facts

Armed with the results of the information you've shared, my background provides me with a satellite view of what may or may not be working for you personally and business with respect to tax and risk mitigation.



Step 6: Review analysis with you

This stage allows us to meet over video conference to review my findings and analysis based on information provided to date. Introduction to potential solutions and strategies will be discussed with you. Questions and adjustments are encouraged to ensure we maintain your budget and goals.



Step 7: Underwriting & actuarial consults

If your needs fall under special circumstances (such as insurability issues due to health, high net worth requirements, etc.) - I will review challenges with carrier underwriters, re-insurers and actuarial specialists. This stage reduces the odds of unnecessarily blemishing a client's Medical Insurance Bureau (MIB) rating and improves overall success.



Step 8: Collaborate with your professional team

A 3-D image of earth is obtained through multiple satellites circling the planet. This example also holds true relative to your holistic planning and when necessary integrating your team of professionals: i.e. accountants, lawyers, bankers, investment specialists and tax specialists.



Step 9: Strategy implementation

Our due diligence is complete. Applications have been submitted, underwriting approved and contracts are now in force. This next phase represents the easiest stage for you and yields the greatest relief by solidifying peace of mind knowing family and business interests are protected and funded in the event of... well, life happening.



Step 10: Lifetime, boutique client management

Our immediate work may be complete but my lifetime commitment to ensuring your Trusted Plan remains current and effective has just begun. By meeting annually we can intercept unexpected events due to changes in health, family or your business. Your holistic plan and ensuring your team of professionals remain in sync - are paramount.