THE S.T.A.R.T. HERE PROCESS™

We have designed a process to help you (and us) make an informed and educated decision about working together.

We call it The S.T.A.R.T. Here Process™.

S — SCHEDULE A CALL

A 15-minute phone call will give us both a chance to make sure your situation matches our expertise. After all, you wouldn't see a Cardiologist if you needed foot surgery.

T — TEAM MEETING

The next step is a visit to our office. During this one-hour meeting, our team will get crystal clear on your financial goals, needs, and concerns.

A — ANALYZE

We will apply 15+ years of experience, decades of Nobel-prize winning research, and thousands of hours of training to answer three critical questions for you.

R — REVIEW ANALYSIS

With the analysis complete, we will have a second meeting to review the results. In plain English, we will explain exactly what you need to do to reach your financial goals.

T — THINK ABOUT IT

We are looking for long-term client relationships, not a quick transaction. It's important that you take as much time as needed to make a decision.

! — HERE WE GO!

We are truly honored to be working with you. Before the fun begins, we will regroup (via phone or in-person) to answer any outstanding questions and set expectations for the new client process.

Flip the page to read the highlights.

Here Are The Highlights

Learning our process will give you a framework for evaluating us and other firms you might be considering.

No Cost or Obligation

We want you to know exactly how we can help before you pay us a single dollar.

3 Big Answers

You will finish with answers to the three biggest questions about retirement.

15-Minute Call

The very first step is a 15-minute phone call with our team.

How Do I Know If I'm a Good Fit?

We deliver the greatest value when we focus on complex situations that require our expertise. Our typical clients are:

- Professionals over age 50 who are retired or want to know they have the ability to retire one day.
- Diligent savers who have accumulated investment and **retirement assets of $1 million or more**.
- People who understand that the success of their retirement is too important to be doing it themselves and value expert guidance.

SCHEDULE YOUR 15-MINUTE PHONE CALL

www.definefinancial.com/start