



THE CARES PROCESS





WHY THE CARES PROCESS?

- Assists you in a process designed to help you achieve Specific, Measurable, Achievable, Relevant, and Time Based goals
- Provides relevant facts and personal insight for informed financial decisions
- Supports in developing and prioritizing achievable goals
- Guidance in creating custom solutions
- Promotes quality, consistency and continuity within a financial process
- Provides information for collaborative and professional support when appropriate and necessary
- Requires documentation in an effort to improve the probability of success
- Provides a Trusted Advisor who CARES for future service
- Establishes a written history of our relationship for continuity if something happens to either of us
- Provides a clear picture and path to the future for you and those you care about, rather than relying on guessing and luck



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