

## ARE YOU READY TO EMBARK ON THE JOURNEY OF A LIFETIME?

Where are you right now in your financial journey?

Where is it you want to go?

No matter where you are in your life and your finances, Beyond: The Journey has a package of innovative products, services, and tools designed to empower you to make your best financial decisions. Today, and well into the future.

With relevant, timely, and practical information included with a suite of tools that can help you take advantage of every opportunity, avoid costly mistakes, and weather every financial storm:



### GUIDANCE

for those just starting  
their personal financial  
journeys

- personal planning portal
- foundational financial plan
- spending plan optimization
- monthly educational updates
- 401K quarterly recommendations
- annual meeting
- life insurance analysis
- disability insurance analysis
- weekly office hours



### SECURITY

for those who want to  
protect their progress

- all of the **Guidance** level benefits, plus:
- advanced financial plan
- investment analysis
- college funding optimization
- tax return preparation
- pre estate planning consult
- semi annual review meeting



### STRATEGIZE

for those who are ready  
to maximize their assets

- all **Guidance** and **Security** benefits, plus:
- long term care planning and analysis
- estate planning documents
- business planning
- quarterly review meetings



### COASTING

for those seeking worry-  
free enjoyment of their  
financial achievements

- required minimum distribution (RMD) planning
- charitable planning
- annual review meetings
- generational wealth meeting, so you can pass along your knowledge, values and intentions as well as your assets