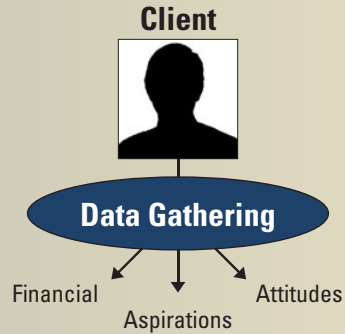


THE TOTAL PLANNING PROCESS FOR FINANCIAL INDEPENDENCE AND SECURITY

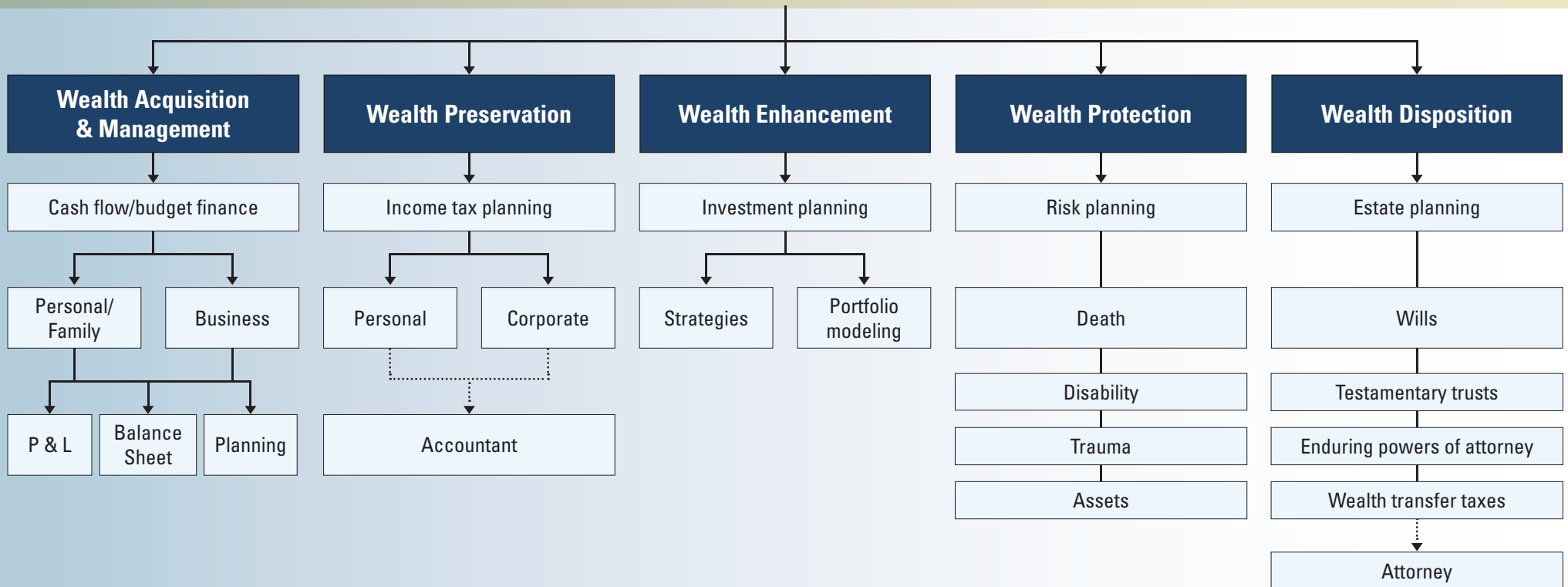
Financial Planning Process

1. Identify goals, dreams, aspirations
2. Assess the current situation
3. Agree on objectives and strategies
4. Establish time frames
5. Implement the plan
6. Confirm review program
7. Reassessment, recommitment and accountability



The Five Critical Financial Issues

1. Making it
2. Keeping it
3. Enhancing it
4. Protecting it
5. Transferring it



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