

## From the consumer:

- Initial thoughts and comments
- Big picture "goals" and why they are seeking potential guidance
- Your expectations
- Your prior experiences

## From Clear Path Advisory:

- Being independent advisors and what that means to you
- Why us:
  - Let me share a story
  - D-3 Process
    - Discovery
    - Design
    - Deploy
  - Three Initiatives where Value is at the forefront:
    - Planning
    - Long-term historical perspective
    - Behavioral coaching
  - Why do planning - think about these questions:
    - Where are you now? (A snapshot of your current scenario)
    - What are you currently doing? (How much and where are you investing dollars?)
    - Based on where you are and what you are doing, where is this taking you?
    - Is where you are going where you want to go?
    - Do you have a means and method of monitoring and overseeing?
    - Do you have a trusted relationship, an objective "eye" to engage and guide?
  - Either:
    - You will outlive your money, or
    - Your money will outlive you.
      - The "reward" for this will be independence and dignity (something we all want later in life).
- Fees we charge / How are we compensated
- Questions?