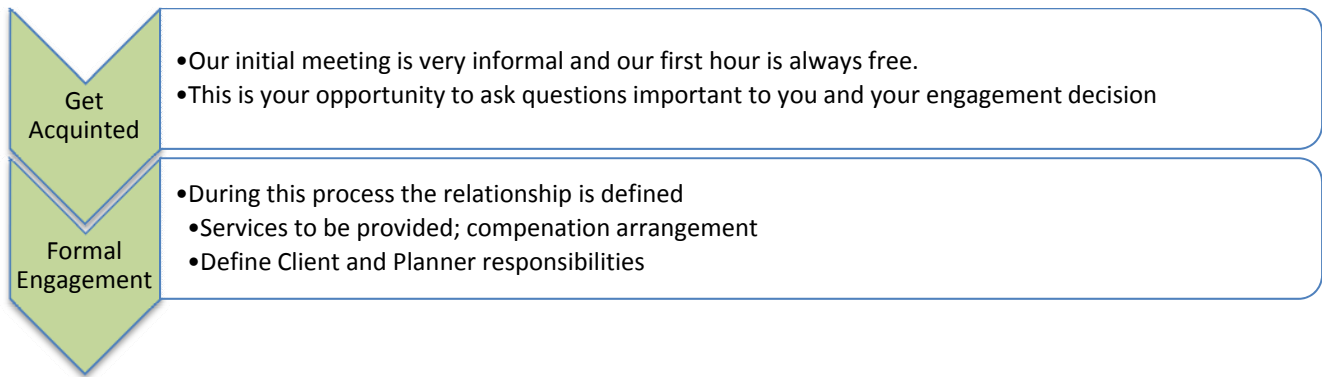


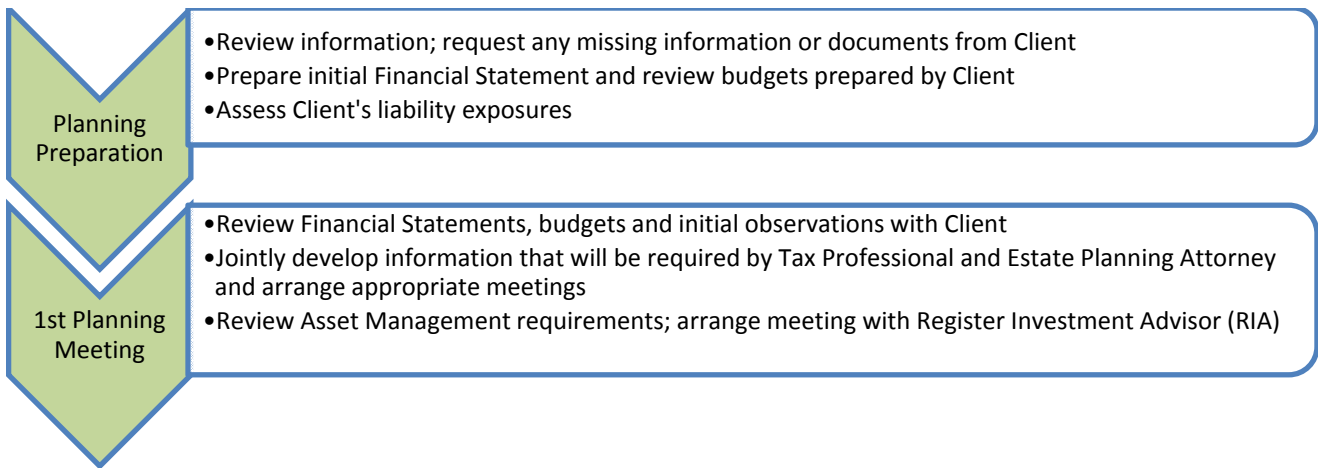
The Cadre General Process



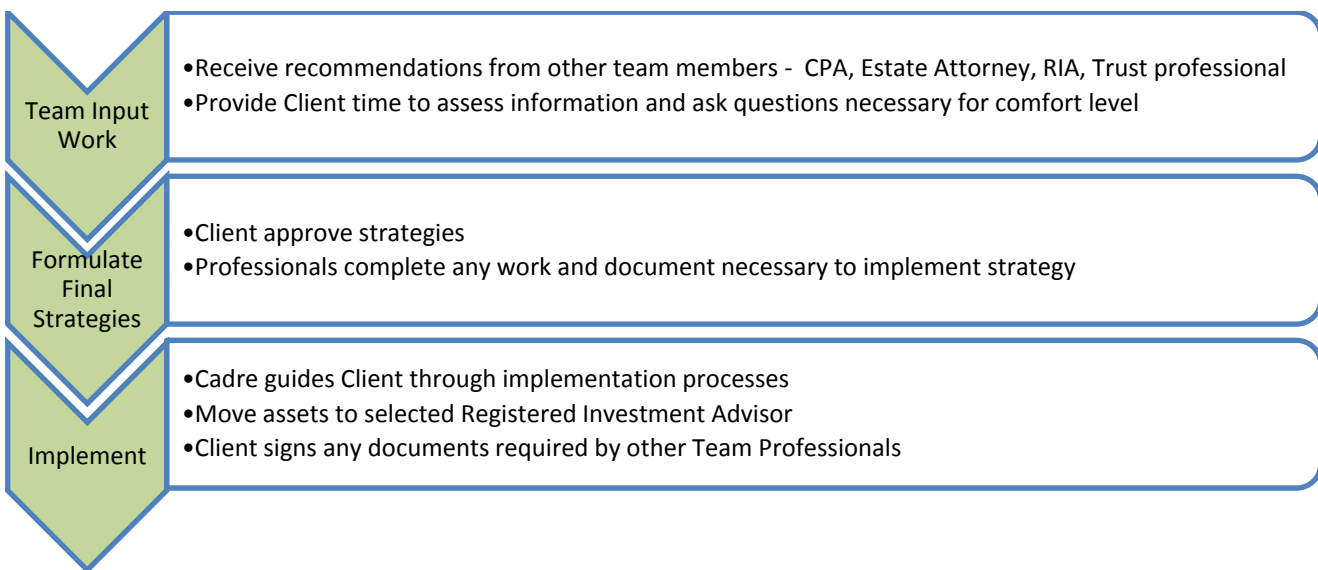
INFORMATION GATHERING AND CLARIFICATION – 3 TO 4 MEETINGS



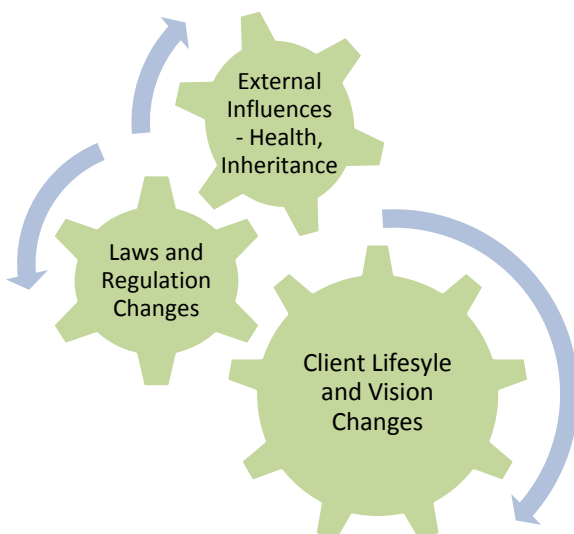
ANALYZING AND EVALUATING CLIENT DATA



DEVELOPING AND PRESENTING RECOMMENDATIONS - IMPLEMENTATION



RENEWAL MEETINGS AND MONITORING



Nothing seems to stay the same.

Periodic **evaluation reviews** are necessary to:

- Assess Investments
- Review changes in family structure, inheritance, health issues, major law and regulations, Client Goals, retirement, life style changes
- Alter your plan and documents due to changes

We will always walk with you and help you anticipate and react to inevitable change.