

Lifeway Financial

The Planning Journey

1

Initial Meeting

About one hour

We talk about why you reached out, the questions you want answered, and the kind of help you need. There is no cost or obligation.

2

Discover and Design

Discovery usually begins in the first week

We collect and organize your financial information, discuss your goals, address immediate concerns, and develop your initial financial plan.

3

Implement and Execute

Initial design and implementation typically in the first month

We help put the plan in place and work through the account changes, strategies, and decisions involved.

4

Ongoing Planning

Quarterly follow-through, annual review

We meet two or three times each year, revisit your goals annually, and adjust the plan when your life or circumstances change.

Timing is indicative and varies with your situation, the information available, and the decisions in front of you.

Lifeway Financial · 972-378-3677

Advisory services are offered through Lifeway Financial Corporation, an SEC-registered investment adviser. Registration does not imply a certain level of skill or training. This material is for informational purposes only and is not investment, tax, or legal advice.