



A great financial advisor will start all conversations with questions, not answers. They will want to understand what you value, your pain points, your goals, and aspirations.

They will use their years of training and experience to create a thoughtful framework that will lead to a comprehensive plan of attack. .

This plan won't be stored in your attic to be forgotten - the advisor will make sure it is a living breading dynamic document that changes as you evolve as a person

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