

What Is Financial Life Planning?



FINANCIAL
LIFE
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Financial Life Planning is about knowing—and planning for— your version of your best life.

It's understanding your money mindset. It's learning what you value most in life. It's planning for—and realizing—the rich life you deserve.

Your financial *life* advisor will work with you to uncover what is most important to you, what you hold most dear before making a single financial recommendation.

Sounds rather obvious, doesn't it?

But many financial advisors approach personal finance strictly by the numbers—budgets, insurance, taxes, investment returns and more. While the numbers matter—and can matter a great deal— they don't exist in a vacuum. Your numbers exist to serve you. To help you create the life that thrills you and your family.

So we financial life planners start with discussing some big questions that you may not think about every day. Questions like:

“What do you value most, right now?”

“How do you define success in your working life? Your family life? Your financial life?”

“What would provide the greatest satisfaction in your life?”

We even dig into your early memories and experiences with money because that's what lays the foundation for your money mindset: how you view money and its role in your life.

The results can be quite stunning.

Long-simmering dreams come back into the light and unleash a new sense of excitement and purpose. Or a relationship dominated by money disagreements can be transformed as each party starts to understand their situation and communicate in new ways.

We've been honored to be a part of making many lives measurably better—[you will find some of our favorite stories here.](#)

Financial life planning: The only kind we practice.

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