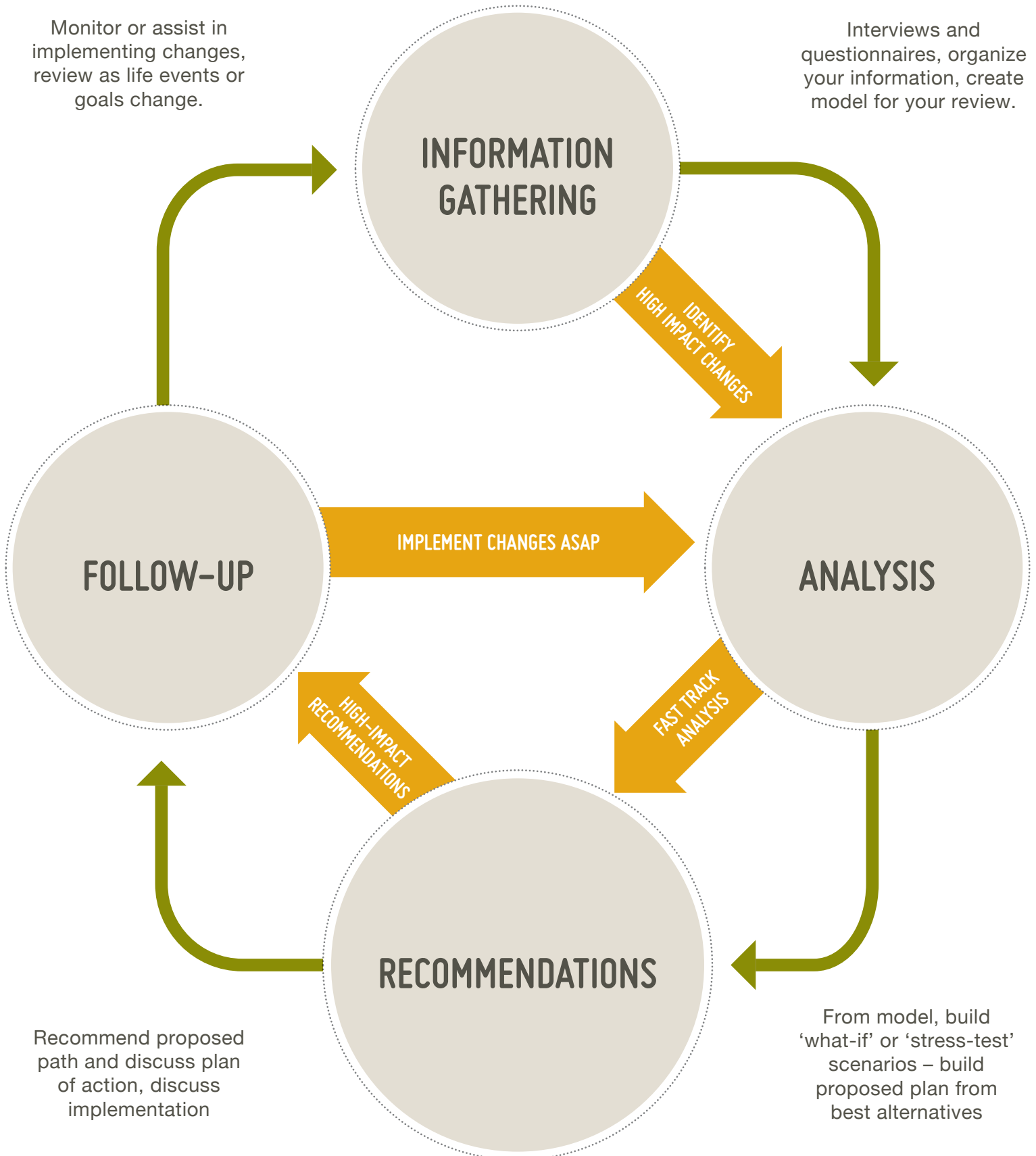


Monitor or assist in implementing changes, review as life events or goals change.

Interviews and questionnaires, organize your information, create model for your review.



**INFORMATION GATHERING**

**ANALYSIS**

**RECOMMENDATIONS**

**FOLLOW-UP**

IDENTIFY  
HIGH IMPACT CHANGES

FAST TRACK  
ANALYSIS

HIGH-IMPACT  
RECOMMENDATIONS

IMPLEMENT CHANGES ASAP

Recommend proposed path and discuss plan of action, discuss implementation

From model, build 'what-if' or 'stress-test' scenarios – build proposed plan from best alternatives