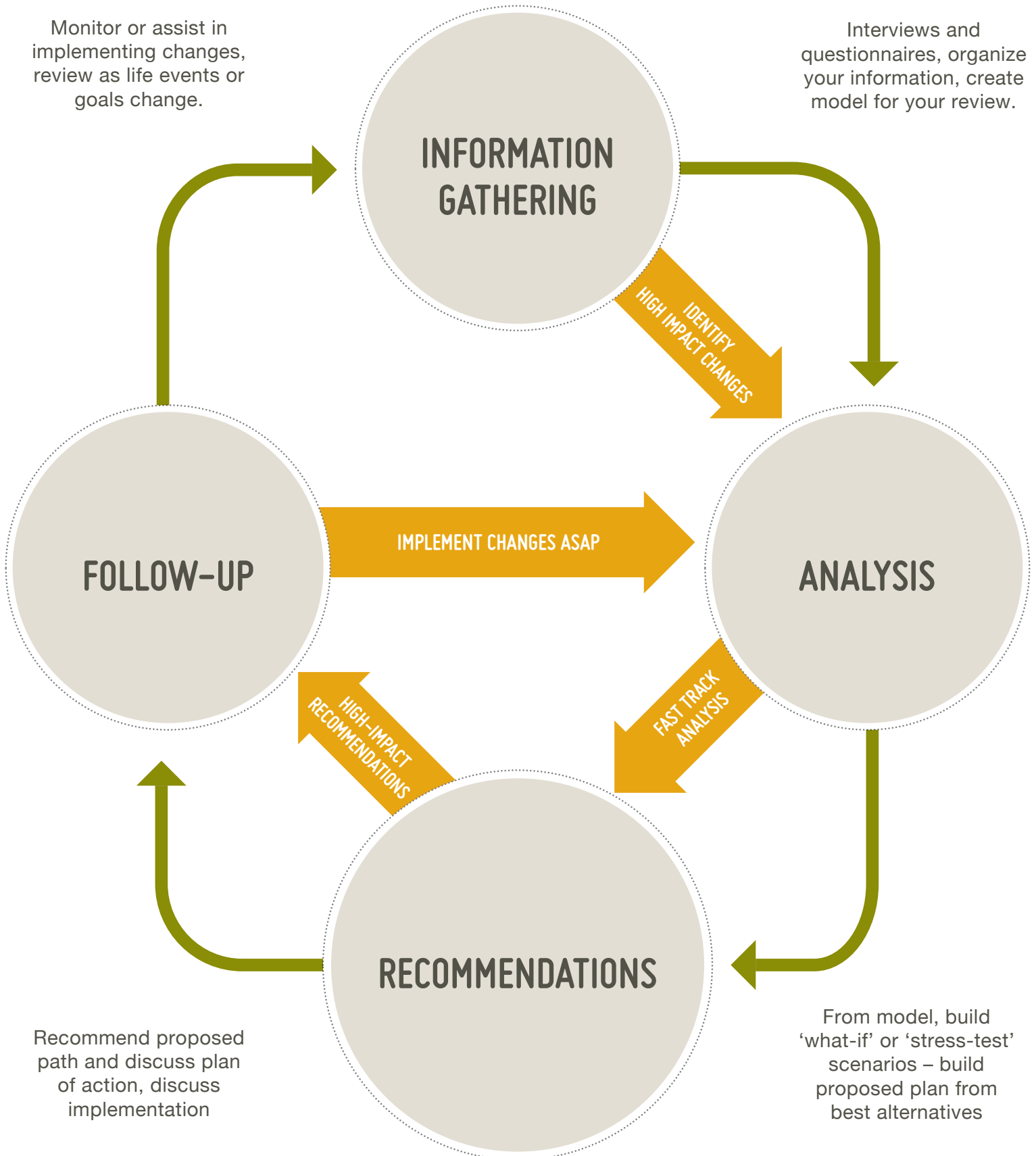


Monitor or assist in implementing changes, review as life events or goals change.

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



INFORMATION GATHERING

ANALYSIS

RECOMMENDATIONS

FOLLOW-UP

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

IMPLEMENT CHANGES ASAP

IDENTIFY
HIGH IMPACT CHANGES

FAST TRACK
ANALYSIS

HIGH-IMPACT
RECOMMENDATIONS