

**At Eagle Ridge we
offer comprehensive
Financial Planning
to all our clients.**

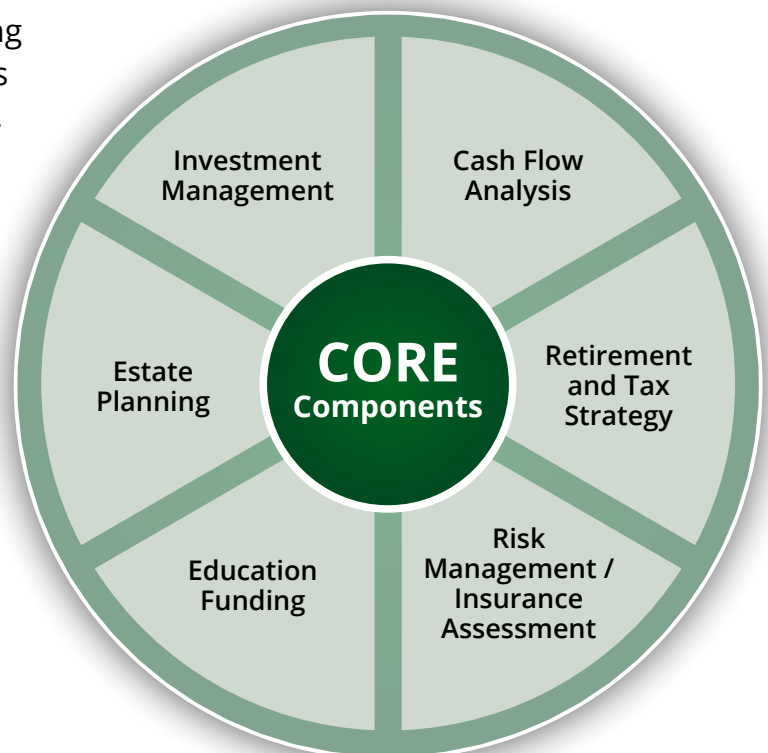


What is Financial Planning?

Financial planning is the practice of managing all areas of your finances to reach your goals and prepare you for the uncertainties of life.

COMMON OBJECTIVES INCLUDE:

- Designing an ideal retirement
- Leaving a legacy for loved ones
- Coordinating charitable giving
- Purchasing real estate
- Funding education for children and grandchildren
- Business succession planning
- Risk management / Insurance planning
- Tax efficient decision-making



No matter what stage you're at in life, financial planning can help you attain your goals and provide financial security for you and your family. With a plan in place, you will feel more organized, make better decisions, and have fewer concerns about money. Completing a financial plan takes time and effort, but the benefits are well worth it.

WORKING IN CONCERT WITH YOUR LEGAL, ACCOUNTING, INSURANCE AND OTHER ALLIED FINANCIAL PROFESSIONALS, WE WILL EVALUATE YOUR ENTIRE FINANCIAL PICTURE, DEVELOP STRATEGIES TO ACHIEVE YOUR GOALS, AND ADJUST THE PLAN WHEN YOUR LIFE CHANGES.

Financial Planning at Eagle Ridge

1	Introduce the process and your personal CFP	Eagle Ridge
2	Outline goals, objectives, circumstances, priorities	Eagle Ridge with Client
3	Gather information and provide to Eagle Ridge	Client
4	Analyze your current financial situation	Eagle Ridge
5	Identify strengths and vulnerabilities	Eagle Ridge
6	Review information	Eagle Ridge
7	Develop recommendations and alternative scenarios	Eagle Ridge
8	Present the plan and recommendations	Eagle Ridge
9	Schedule follow-up items and begin implementation	Eagle Ridge with Client

For further information or to talk with a planner, please call us at 203-227-4515 or email Alie Hamilton at a.hamilton@eagleridgeinvestment.com.