

Why Do You Need a Financial Coach?

To improve what you were never trained to improve.

| | | |
|------------------------|--------------------|-----------------|
| Credit scores | Mortgage options | Buy vs. Lease |
| Goal-based Investments | Financial planning | Home incentives |
| Budgeting for equity | Debt repayment | Tax strategies |
| Insurance fit | Credit card costs | And more |

We are financial advisors who offer our knowledge and experience in a new way: as a financial coach.

The Difference?

No investments or insurance is sold.
We're 100% focused on your financial fitness.

Our goal: to help individuals and families improve their financial performance, one financial metric at a time.

As your coach, we're your advocate, your financial mentor, and sometimes your needed voice of reason.

In the same way a fitness coach builds your physical fitness, we build your financial fitness.

Ready to stop wasting time struggling with your money?

How to Contact Us

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Get your money fit.



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Get Financially Fit



**Is your money doing its job
as well as you do your job?**

Get your money fit.



About Us

We're independent financial advisors affiliated with one of the largest US financial networks. Many of our clients asked if we would provide them with a financial coaching—service only.

They wanted choice.
They wanted flexibility.
They wanted results.

We listened.

Meeting 1x per month, we now offer customized financial action sessions to help you improve your financial performance in a targeted metric.

Not money savvy?

Don't worry.
We'll lead you by example.

Our focused time together means focused improvement in your financial life. Every session is designed to improve your financial fitness.

Let our knowledge and experience be your advantage.

More Financial Fitness = More Financially Fit
We'll apply our methodology to your choices.



Establish your goal

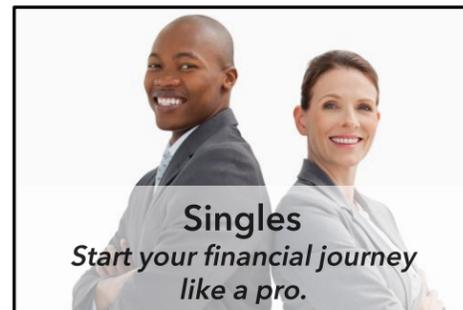


Improve your metric



Build your confidence

Get your money fit to get more life from your money.



Get your money fit.



We will lead you.

Don't let complex, consequential financial decisions confuse you . . .
. . . and cost you.

- ✓ Stronger, quicker, more accountable progress than DIY.
We'll make sense of it for you.
- ✓ No membership fees.
Cancel any time.
- ✓ Any situation. Any age.

Our Goal: to develop a stronger, more resilient, goal-focused, and more financially empowered **you**.

