What to Expect—Our Four Step Meeting Process

During our first visit, we **ask** a lot of **questions** to **understand** you and how your current financial plan is organized.

The second time we meet, we **share** the **results** of our **analysis** and **decide** whether or not to work together.

The third time we meet, we **begin paperwork** that allows us to implement the changes you desire. This is when we officially begin working together.

After you become a client, we execute your personalized ***Successful Retirement Plan*** to help you reach your retirement goals.

Frequently Asked Questions

1. What is the charge for an appointment? **Consultations with Family Focused Financial are complimentary.**

2. I already have an advisor. Why would I meet with you? **Because something as important as retirement deserves a second opinion.**

3. I'm concerned about taxes, market losses, and outliving my retirement income. Will you help me with these? **Yes! We specialize in building Successful Retirement Plans to address each of these areas, and more.**

4. Before I sign paperwork, will I know what fees are charged for managing my funds? **Yes! All fees will be disclosed. At Family Focused Financial, transparency is a key to building trust! Our goal is to serve you with integrity and respect.**

Craig Anderson, ChFC® | President | **Family Focused Financial**
269-431-0743 | www.famfocfinancial.com | Member FINRA/SIPC