FAMILY FOCUSED FINANCIAL

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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 build and execute your personalized ***Successful Retirement Plan*** to help you reach your retirement goals.

Frequently Asked Questions

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

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

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.

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.

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Securities licensed in MI and IN. Advisory licensed in AZ, DE, FL, GA, IN, MI, TN, and WV.