

THE ASSET HARVESTER PROCESSSM

OUR GOAL IS TO HELP YOU REALIZE YOUR DREAMS FROM THE SEED OF YOUR ENDEAVORS



Daniels Financial Group, Inc.
The Pathway to Your Financial Future Begins Here



1

THE DISCOVERY SESSIONSM

- Introduction to the firm
- Our Guiding Principles
- Your personal and financial goals
- What you would like us to do
- Agreement to move forward

2

THE ASSET HARVESTER DESIGNSM

- Your Personal Financial Profile
- A strategy to bridge the gap between asset accumulation and distribution
- Designed to enhance income potential and reduce dangers

3

THE ASSET HARVESTER BLUE PRINTSM

- First look at your Plan
- Reviewing its potential
- Clarifying content
- Refine to pursue your financial goals

4

THE ASSET HARVESTER SOLUTIONSM

- Presentation and Implementation Strategies of your Plan
- Your road to pursuing a Quality of Life consistent with your goals and dreams begins here.

5

THE FUTURE HARVEST PLEDGESM

- Our commitment to Accountability and Communication
- Building Lifetime Relationships
- Progress Session timetable
- Our Lifetime of Learning pledge

6

REAL WEALTH EMPOWERMENTSM (OPTIONAL)

- Thinking about your assets in new and different ways through legacy planning.
- Helping you focus on the Real Wealth in your life. Is it your family, home, money or something else?

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