ForthrightFinances
Delivering Financial Clarity

Client Service Experience

www.ForthrightFinances.com

As our client you can expect to receive individual attention and support on an ongoing basis:

- ## Comprehensive Financial Planning

  We encourage our clients to create a financial plan prior to making investment decisions. We will help you to refine your dreams into actionable goals and create a strategy to pursue those goals as efficiently and effectively as possible.

- ## Investment Management

  As the CERTIFIED FINANCIAL PLANNER™ responsible for your financial assets, Scott is dedicated to acting in your best interest when making recommendations about your savings and investment strategies. That includes making sure your investments are allocated appropriately for your personal risk tolerance and financial stage of life.

- ## Annual Financial Reviews

  A crucial part of financial success is to review your plan on a regular basis. We are committed to meeting with you regularly to make sure your financial plan is still working for you and to change what is not.

- ## Quarterly Phone Contact

  We will be in contact with you on a regular basis to discuss any developments in your life that might affect your investments or your financial goals.

- ## Monthly Financial Newsletters

  We like to provide clients with the opportunity to learn more about a variety of financial topics. You will receive monthly email newsletters on those topics and may opt out at any time.

- ## Beneficiaries Reviewed Annually

  Often times the best intentions go awry when beneficiary designations become outdated or obsolete. We will review your beneficiary information with you annually and recommend an estate attorney if needed.

- ## Unlimited Phone and Email Support

  We are here to help implement and monitor your plan throughout the year – as well as answer any other questions that may come up.