

SEVEN STEPS TO BUILDING A **BRIGHTER** FINANCIAL FUTURE

OUR SERVICES

◆ ONE-TIME, AS-NEEDED OR ONGOING ADVICE

on your entire financial situation or on specific topics such as...

- Cash Flow
- Retirement Planning
- Investments
- College Funding
- Insurance Needs
- Tax Planning
- Estate Planning

◆ FINANCIAL CHECKUPS

◆ SECOND OPINIONS

For detailed information and a host of helpful financial information, visit our website at:

www.myfee-onlyplanner.com

STEP 1:

Call for an Introductory Packet

STEP 2:

Get Acquainted Meeting
Discuss Financial Objectives
Develop Estimate of Fee

STEP 3:

Data Gathering and
Initial Preparation

STEP 4:

Interactive Goal Setting Session

STEP 5:

Analysis and Plan Formulation

STEP 6:

Financial Plan Presentation

STEP 7:

Plan Implementation and Follow Up

Then

As-Needed Advice

Call when you need help

Or

Asset Management

For clients who wish to transfer supervision and monitoring of their investment portfolio

WHO WE ARE

Mahlon R. Edwards Financial Planning & Investment Strategies, Inc. is **unique** in that we provide our financial planning services on a FEE-ONLY basis. Only 1% of the nation's financial planning firms are structured this way. In addition, we have **no account minimums**. We make our services available to everyone, so that people from all walks of life and income brackets may experience the benefits of our "Fee-Only Financial Planning and Advice for Everyday Life."

HOW WE WORK

As a FEE-ONLY financial planning firm, we are compensated directly and only by our clients. **We do not receive commissions from the sale of investments or insurance products.** Our fees are based only on the amount of time spent evaluating the client's financial situation and meeting with them to provide specific recommendations.

WHY CALL NOW

Financial Planning is for everyone, not just the affluent. So whether you are building assets for the future or seeking to preserve, protect and enjoy the wealth you've accumulated, we can help you along the way. Call us today to schedule a complimentary, no-obligation get-acquainted meeting.

You don't need a fortune to start building one. Call and get started today.