



WEALTH DIMENSIONS

Achieving What Matters Most

The Dimensions of Wealth

It starts with a process. Without one, financial strategies and wealth management plans have little focus, can't be personalized and fail to reach short- and long-term goals.

Many of Wealth Dimensions' affluent clients have complex financial situations and lead busy lives, leaving little time or energy to sort through the abundance of financial choices. At Wealth Dimensions, we ease the burden by acting as your personal financial advocate. We do the research and analysis, then educate and guide you in making those complicated financial decisions. We pinpoint what is required for you to stay on course to a healthy financial future.

Wealth Dimensions believes in taking a 360-degree view of what's important to you. Our **Dimensions of Wealth** process enables us to define your personal and financial goals in terms of **Freedom, Security and Impact**. Then, we analyze these dimensions to determine your priorities and offer our expertise, guiding you onto a clear path to achieve what matters most.

Each dimension, **Freedom, Security and Impact**, represents key lifestyle choices and personal priorities that influence your wealth management goals. As your financial partner, Wealth Dimensions takes the time to learn what you value and how to integrate these elements into your personal plan.

We engage you in a discovery process that assesses and quantifies your current situation, uncovers obstacles and identifies a clear plan to enable you to reach your desired lifestyle. You gain valuable insight into what

you need now and what it takes to get you where you're going. Our wealth-management process is comprehensive, focused and systematic.

At Wealth Dimensions, we believe that financial security is not achieved simply by using a specific portfolio or investment strategy. Rather, your wealth management plan depends on a combination of requirements that are revealed as you go through our discovery process. Together, we help you to remove uncertainty and expose the critical elements that drive your planning and investment goals.

Bringing It All Together

Wealth Dimensions' process begins with taking the time to really get to know each other. Up front we determine whether we share a similar philosophy and how we can develop a strong sense of partnership. While the discovery process is similar among our affluent clients, the resulting purpose-driven wealth strategies are custom-designed and vary based on your unique needs, input and our financial analysis. It is a big-picture approach, where wealth strategies are tied to the quality of life you are seeking to achieve.

Dynamic and continuous, this process is monitored and managed over time, so that it continues to reflect changes in your lifestyle. As you enter various stages of life, we keep you on track by reviewing your plan and refining it. When you have to make those complex and difficult decisions, we are there to simplify the process. We advise and guide you by introducing new strategies and resources that evolve with you, providing you with confidence to enter that next phase.



Dimensions of Wealth

Freedom: Achieving financial independence to live your life without certain constraints and enabling you to explore more personal choices.

Security: Managing risk to protect and maintain a level of comfort and safety.

Impact: Aligning your goals with your sphere of influence, such as family, friends, community, charity, church and legacy.

