STORYBOARD – Financial Advocate Vertical

With all the demands on your time and attention, organizing your finances can get put on the back burner.	
But, for the most part, you think you have everything covered … Then you hear about skyrocketing health care costs … read about issues surrounding social security … or … hear friends talk about the expense of having an elderly relative move in … and uncertainty sets in. In fact, the more you think about it, the more uncomfortable you become.	
That is where we can come in. As your Financial Advocate, we can guide you on your financial journey. By paying attention to the details and taking a 360° approach, we can help you reach your goals.	
We organize all of your personal and family financial information in one place. Our sophisticated technology consolidates your information and presents it clearly. All of your accounts will be updated nightly, and accessible to you in your own secure, personal Web page that lays out your entire financial world.	

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This gives you a reliable, up-to-date financial reference point any time day or night. So, no matter where you are, we can both quickly get the data we need to help you make a decision.	
As your Financial Advocate, we will collaborate with your other advisors so that your entire professional team has the big picture.	
With this structured approach, we can show you how everything you have worked hard to accumulate over the years, works cohesively. You will always know where you stand with up to date cash flow statements, balance sheets and your statement of net worth.	
We will remain at your side, looking out for you – pointing out unusual account activity, portfolios that need re-balancing, and even when your frequent flyer miles meet certain reward thresholds.	
Our safe and secure online Vault allows you to store and organize your important legal, financial and family documents. The Vault has proven to be invaluable to our clients, particularly in times of need -- like having a back-up of treasured family photos if a natural disaster destroys your home. As long as you can get to a computer, you can retrieve your important	

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documents, pictures and even audio clips.	
As your Financial Advocate, we organize your financial world, provide you with guidance, give you gentle reminders and help you stay on course.	
Find out how having a Financial Advocate can make the difference in YOUR financial future.	

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