



Financial Directions: Sharing Your Vision, Guiding Your Decisions.



"I get tremendous gratification from encouraging people to focus clearly on their future financial success and security."

—Larry Brasel, Financial Advisor



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We understand that your wealth is more than just money.

Our mission is to clearly identify and relate people's values to their financial security and success.

Our focus is long-term client relationships and planning, helping people and businesses make smart choices with their money. We take a comprehensive approach to managing our clients' goals and subsequent financial plans. We like working with people who are deeply committed to their future financial success and security, whether you are a business owner, a soon-to-be retiree, young family, or executive; the fact is, we like helping people.

Our Services Include...

• **WEALTH ACQUISITION AND MANAGEMENT**

Cash flow, budget, tax structuring, retirement planning, college funding planning, financial profiles computerized planning model

• **WEALTH PRESERVATION**

Tax control strategies

• **WEALTH ENHANCEMENT**

Investment planning, asset allocation strategies, risk assessment analysis, 401k rollovers

• **WEALTH PROTECTION**

Asset protection from lawsuits and judgments, life insurance, disability insurance, long-term care insurance

• **WEALTH TRANSFER**

Estate planning, wills, testamentary trusts, enduring powers of attorney, tax implications

Your values guide your financial decisions and understanding and applying your values to your wealth is an integral part of our financial planning process.

FINANCIAL DIRECTIONS Planning Process

LIFE CHANGES

AS LIFE CHANGES,
SO TOO WILL YOUR
FINANCIAL PLAN

DISCOVERY

WE NEED TO UNDERSTAND
YOUR VALUES & WHAT'S
MOST IMPORTANT TO YOU

DEVELOPMENT

DEVELOP STRATEGIES
INTO A PLAN

DEFINING

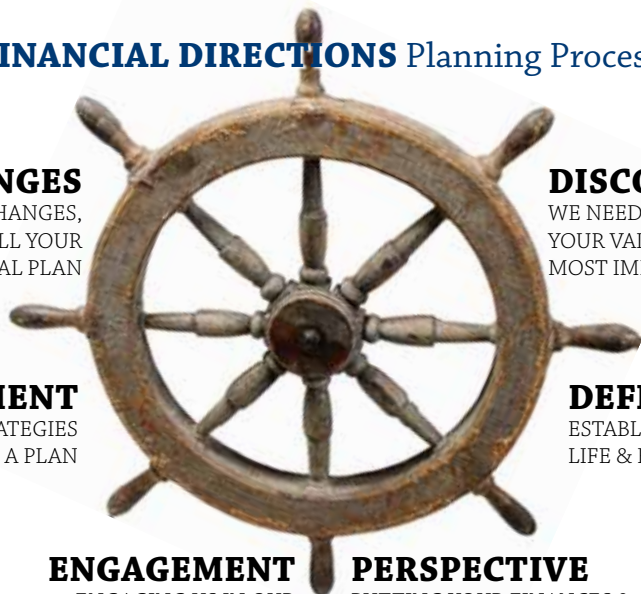
ESTABLISHING YOUR GOALS:
LIFE & FINANCIAL

ENGAGEMENT

ENGAGING US IN OUR
ADVISORY SERVICES

PERSPECTIVE

PUTTING YOUR FINANCES &
LIFE INTO PERSPECTIVE



"My clients know where they are, where they want to go and exactly how they are going to get there. Peace of mind is the result."

Visit us at www.northbeamfinancial.com to learn more about how we help: Business Owners, Executives, Families and Retirees.

