

INTRODUCING

The Elements Financial Planning System™

Elements is a set of financial indicators that provide a clear view of your financial health. These measurements help answer questions like:

- Are you taking the right amount of risk?
- Do you have the right mix of assets?
- How much wealth do you need to make work optional?
- Are you using your income wisely?



You can think of the Elements scorecard like your vital signs at a doctor’s office: they help us both see how you’re doing financially and where we should focus our effort to help you progress toward your goals.

How does it work?

Download the Elements mobile app and enter what you know about your financial accounts. We’ll work together to fill in the missing gaps.

Once complete, we’ll both be able to use the app to track your progress towards improving your financial health, increasing your net worth, and accomplishing your goals.

