The Financial Planning Process

Following a methodical process helps to make sure that we are doing everything possible to help you move toward your "preferred future." Here's our process:

- **Step 1: Get Acquainted Meeting** – This is an opportunity for us to meet with you in person to discuss your needs and our services in detail. Then we'll decide together whether we are a good resource for you. There is no cost to you for this Get-Acquainted meeting.
- **Step 2: Goal Setting and Data Gathering** – We review the goals that you have in life and with your money. We also take an inventory of your current financial condition.
- **Step 3: Analysis and Financial Plan –** We review the data and formulate a list of recommendations and discussion items.
- **Step 4: Plan Implementation and Follow Up** – We help, as you see fit, to implement your financial plan. Our firm may be able to help you with some of the needs (ex: investments and/or insurance). We may also work with your other financial advisors.

Steps 1, 2, and 3 may be completed in one meeting or may require multiple meetings. Our goal is to take whatever time is necessary to develop the best game plan possible.

Dan Hardt Financial Services
"Where Your Life and Your Money Work Together"
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