

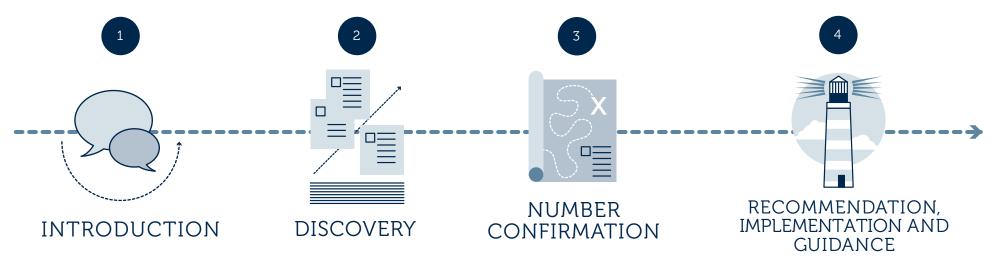


**RUBACH WEALTH** 

Holistic Family Advisors™

Everybody is different, and yet the financial services industry often seems driven by processes that lump people into groups. Finding the products and services that actually meet your needs can mean going beyond the groupthink to find or create solutions that are customized to you.

That's what our process is all about.



- Meet to walk you through our process and get a general understanding of you and what you are looking for
- Collection of dataDeep dive into your

financial philosophy

- Making sure we heard exactly what you said and we are all on the same page
  - Gives you an opportunity to add any elements you may have forgotten about or not thought about before
- Present a personalized plan that allows you to protect what matters to you
- Implement strategies and monitor progress
- Meet annually to review your plan and current needs
- Make changes where necessary to ensure your plan stays on track to meet objectives

At Rubach Wealth, we provide solutions that create ongoing value and protect the things that matter most in your life.

So let's start a discussion about how we can work together to create the right plan for you.



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