



## **Ideal Client Profile**

### **Attitude**

- Has a positive outlook on life
- Recognizes the power of having and implementing a comprehensive written financial plan
- Feels a sense of responsibility about planning for the future
- Recognizes the power of having a CFP® and a CPA under one roof
- Prefers an ongoing relationship with a fee-only, independent advisor

### **Assets**

- Has an investable net worth of at least \$750,000, **or** earned income over \$250,000 and a willingness to save a significant percentage of that income

### **Advocacy**

- Will recommend our services to other individuals that meet our Ideal Client Profile