EMPOWERING YOUR PURPOSEFUL LIFE

THROUGH FINANCIAL CONFIDENCE AND CLARITY

As your trusted confidante, we will listen, help you identify solutions and coordinate with your tax and legal counsel to ensure that all your decisions enhance your life vision.

We are a fiduciary firm; we are *committed to always place your interests before our own.*

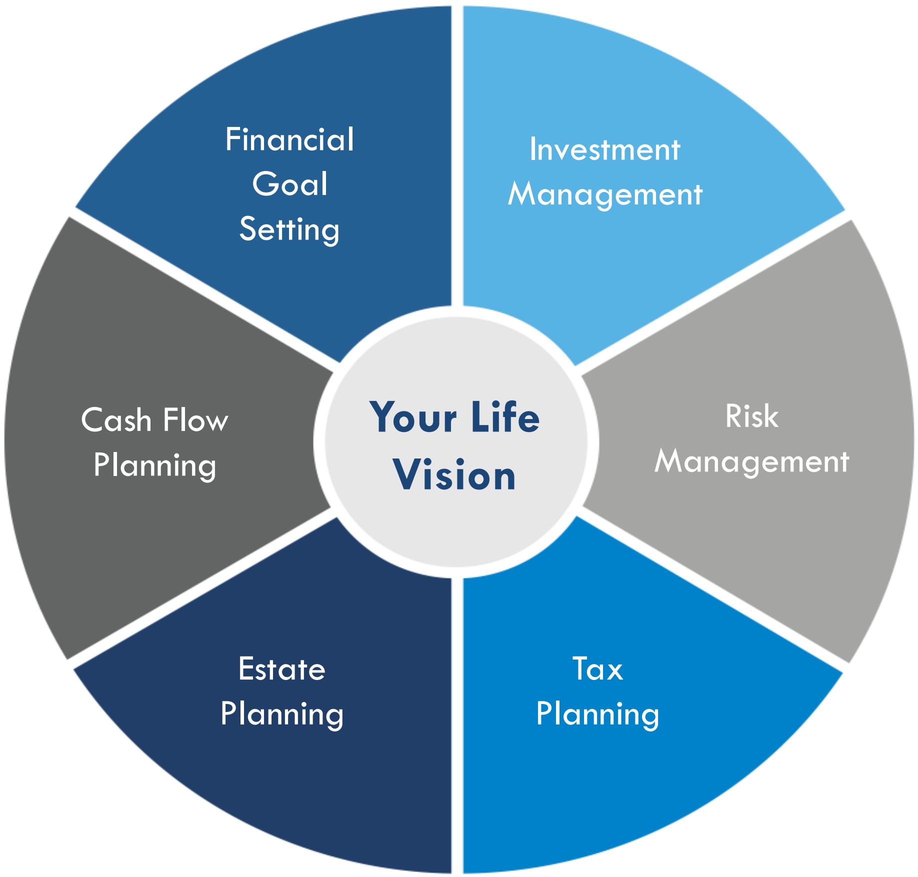
We provide individual services for:

- Generational Wealth
- Emerging Affluent
- Women In Transition
- Business Leaders

We have special experience in:

- Intelligent Aging
- Life Transitions
- Divorce Planning
- Business Succession

Holistic Wealth Management:



Our Process

EMPOWERING YOUR PURPOSEFUL LIFE

discover

- About You
- About Us
- Our Tools
- Our Process

analyze

Financial Planning

- Financial Independence Roadmap™
- Multiple Scenarios designed to achieve your financial goals
- Cash Flow and Net Worth Planning
- Enhanced Ability to Live Your Desired Lifestyle

Investment Management

- Tailored strategy to help you Achieve Your Goals with Lower Volatility
- Risk Level Appropriate for Your Goals and Disposition
- Ongoing Tactical Adjustment

enhance

- Actively Monitor Your Financial Progress
- Provide Ongoing Plan Updates Through Life Changes

STEARNS FINANCIAL GROUP