



Your life's goals are personal, but the path to achieving them may not be clear. We offer expertise, individual attention and customized financial strategies to fit your unique needs. Our financial planning process helps you realize the full potential of your financial future.

## COLLABORATIVE & COMPREHENSIVE

### Financial Planning Services

#### STAKING CLAIM TO YOUR DREAMS

Our in-depth discovery process leads to a deep personal understanding of your short and long-term financial goals. Once we know what you want out of life, we will explore your financial information so we can paint a complete picture of your current financial status.

#### PAINTING YOUR FINANCIAL PICTURE

A review of your financial position provides us with a better understanding of where you are right now. The financial picture we develop will address your balance sheet, cash flow and debt management, and if savings are balanced and appropriate for your goals.

#### PROVIDING CLARITY WITH CONCRETE ACTION STEPS

We aim to provide you with a plan of action to help you reach your goals. You are free to implement the plan on your own, or with another provider. If you choose to work with us, however, know that we strive to offer you the solutions that best fit your needs, and unbiased advice.

#### UNBIASED ANALYSIS OF YOUR OPTIONS

After analyzing the data, we present you with several recommendations designed to help you achieve your unique goals, like buying a home, retiring early, or saving for your child's education. We work collaboratively with you, helping you weigh your alternatives.

#### BY YOUR SIDE

As your life changes, so should your plan. The relationship we forge with you is for the long term. We'll carefully monitor your progress to make sure you stay on track to achieve your goals.

#### READY TO GET STARTED?

Contact us today to set up a conversation about your financial future.



[www.thepiedmontgroups.com](http://www.thepiedmontgroups.com)

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