Our **Relationship**

Portfolio Evaluation

Understanding what you are invested in, what fees you are paying, and how you really feel about market volatility are a crucial part of your financial plan. Together, we will dive into my recommendations and evaluate the right investment portfolio for you.

Discovery & Money Mind

Clarity will be achieved by walking through a net worth worksheet, discovering the way you make financial decisions, and getting direct feedback on what areas of your financial life need attention.

Honest Conversations

During this open discussion, we will identify your deepest hopes, wishes, fears, and desires in life. In the end, we will have a better understanding of what's important to you and how we can financially achieve your priorities.

Action Plan

With your own interactive, custom-built retirement and financial plan, you will feel comforted always being up to date with your financial health. You will have access to Right Capital, our financial planning software, as well as FinLife, our task and goal setting software.

Quarterly Team Newsletter

Each quarter, our team shares our market thoughts and the market performance with you. We provide you with the educational resources to understand what the weather of the market is. Remember - we are in this together.

Quarterly or Semi-Annual Check-Ins

Throughout our relationship, consistent check-ins are important. Do you like more frequent communication or maybe a semi-annual check-in is your preference? Being on the same page when it comes to communication is one of the pieces that make a great client-advisor relationship.

Annual Review

Just like your annual doctor's physical, completing a full review of your financial health at least once a year keeps you aligned with your goals. We will snapshot your current net worth, amend or update your action plan, and review your investment portfolio performance.

Lifelong Relationship

A long-term relationship with you is something I am passionate about. Each year, your needs for me may look different. One year, you may be firing away at your goals and the path stays straight. In other years, the road may look hazardous and unexpected. I'm here with you through it all. My hope is all the same: to help you get where you want to be while enjoying the life you're living now - a lifelong relationship.

Leanne Rahn, Financial Advisor

fiduciary FINANCIAL ADVISORS

*subject to change