

## OUR APPROACH

### AN ENLIGHTENED PHILOSOPHY

around all things financial.

### A PLANNING STRATEGY

that remains fluid and dynamic.

### OUR PROPRIETARY PROCESS...

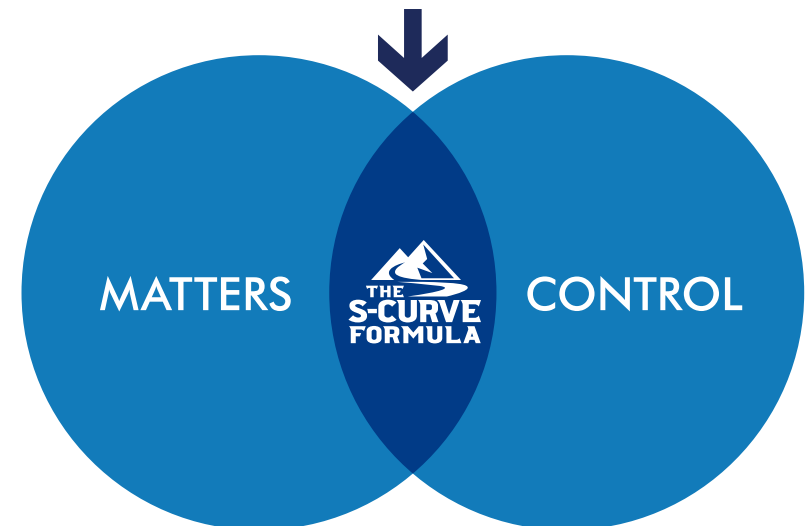
## THE S-CURVE FORMULA™



He who has a *WHY* to live for  
can bear almost any how.

– Friedrich Nietzsche

## WHERE WE LIVE



**WHY**

← FAMILY  
OCCUPATION  
RECREATION

**HOW**

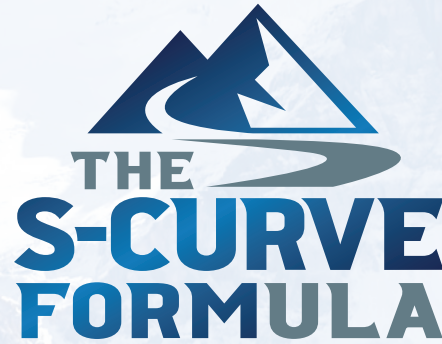
← MONEY

## PHILOSOPHY PLANNING STRATEGY PROCESS

..... ← DISCOVER  
DESIGN  
DEPLOY

cg/Canaccord  
Genuity  
Wealth Management

milestone  
ASSET MANAGEMENT



# THE S-CURVE FORMULA



The process for all business owners begins with a vision, requiring the need for professional counsel. During this stage our team is here to assist in providing clarity in defining and establishing your goals, opportunities and resources.

Once you have met with our team, we will assess all the information you've provided us and streamline it to effectively align with your goals and objectives. This stage allows us to properly uncover opportunities relevant to your goals.

Everyone aspires to see his or her assets and investments flourish. Our team helps guide this growth by channeling your information and needs through our financial planning system to determine how our resources will empower your needs.

To build your success we harness the power of our resources and our expertise to help you grow your portfolio and attain scalability, independence and prosperity.

Even as you approach retirement, it is still imperative for our team to continually revisit your goals and reassess your plan. This ensures your investments remain on track and sustain viable financial longevity.

RISK MANAGEMENT

ESTATE PLANNING

TAX PLANNING

WEALTH MANAGEMENT

CASH MANAGEMENT

PHILANTHROPY

VALUE-ADDED SERVICES