



# J. Plaza & Co.

*Helping you every step of the way*

## **Step 1: Discover**

We'll work closely with you to understand your goals, values, current financial status, income needs and the future you imagine for yourself

## **Step 2: Plan**

We'll develop a written plan or proposal that will be presented to you outlining recommended income, recommended strategies and benchmarks we'll measure

## **Step 3: Monitor**

We will regularly review the progress of your plan against benchmarks and changes in your life, and make adjustments as needed

## **Step 4: Implement**

We will select the tools and resources needed to implement your strategy and to help meet your unique needs and goals.

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Member: (FPA) Financial Planning Association, Silicon Valley Chapter

Member: (FSI) Financial Services Institute

Member: (CLS) Clarke, Lanzen, Skalla Investment Firm Presidents Council

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