# PathWise

## Business & Estate Advisers, Inc.

*With Your Interest In Mind*

A WISE AND INFORMED JOURNEY TOWARD FINANCIAL SECURITY.

| | COMPREHENSIVE FINANCIAL PLANS | CUSTOM-DESIGNED RETIREMENT PLANS | BUSINESS EXIT PLANS |
|---|---|---|---|
| 1 GOAL MAPPING | Getting to know your facts and circumstances. Analyze strengths and dangers. Set goals and timelines. | | |
| 2 CHECKPOINTS | Review your financial situation to see where you are today. | Review current employer-sponsored plan for strengths/weaknesses and identify potential needs. | Review current plan or default plan and identify potential issues. |
| 3 NAVIGATION | Guide you on the benefits and risks of various solutions that may better help you meet your goals. | Guide you through plans best suited for your company and goals. | Guide a discussion on a variety of exit plan solutions and their impact on you. |
| 4 IMPLEMENTATION | Choose a route to do what it takes to get started. | Install and communicate improved plan to your employees. | Implement the strategy to exit when desired. |
| 5 THE VIEW | Present a one-page written overview on what has been achieved and accomplished. | | |
| 6 THE REVIEW | Meet regularly to review programs or change direction. | Meet regularly with employer and employees to continue to monitor and manage the plan. | Meet regularly until exit plan is completed. |

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