

The True Wealth Solution

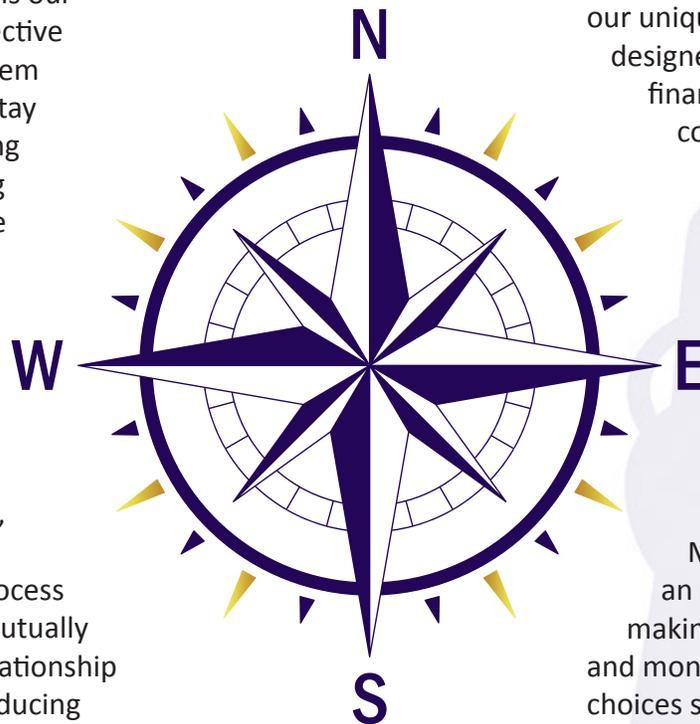
Discover

The Vision Clarifier™ is our discovery process and starting point of the True Wealth Plan™. It is designed to identify and understand each client's True North - your unique goals, values, passions and dreams. It gives clarity to the entire planning process and ultimately serves as the anchor for aligning and allocating God-given resources.

Monitor

The True Wealth Tracker™ is our simple, yet powerfully effective ongoing management system designed for helping you stay on track with accomplishing your life goals and building confidence throughout the journey with your True Wealth Solution™.

It encompasses systematic portfolio monitoring and reporting, plan progress and updating, client education, care and communications. Just as importantly, the process endeavors to cultivate a mutually enjoyable and valuable relationship that goes well beyond producing financial returns.



Plan

The True Wealth Financial Plan™ is our unique financial planning process designed to coordinate all of your finances, plot your present course and help you clearly see where you stand relative to accomplishing your measurable goals. It then sets out charting a strategic plan and designed for achieving the greatest probability of success in getting you where you want to be at life's critical waypoints. Most importantly, it provides an invaluable framework for making wise decision about time and money from the endless array of choices so that you can focus on those things that are truly important in life.

Implement

Our LightPoint Portfolios™ are the convergence of advanced analytics, institutional asset management and impeccable biblical values. Through a diligent screening process, these Biblically Responsible Investment (BRI) portfolios are designed to be clean of companies involved in activities that are contrary to faith and family values (abortion, pornography, anti-family lifestyles, etc.) Investing in the LightPoint Portfolios™ offers a unique opportunity to reflect and perpetuate your faith values while pursuing competitive excellence.