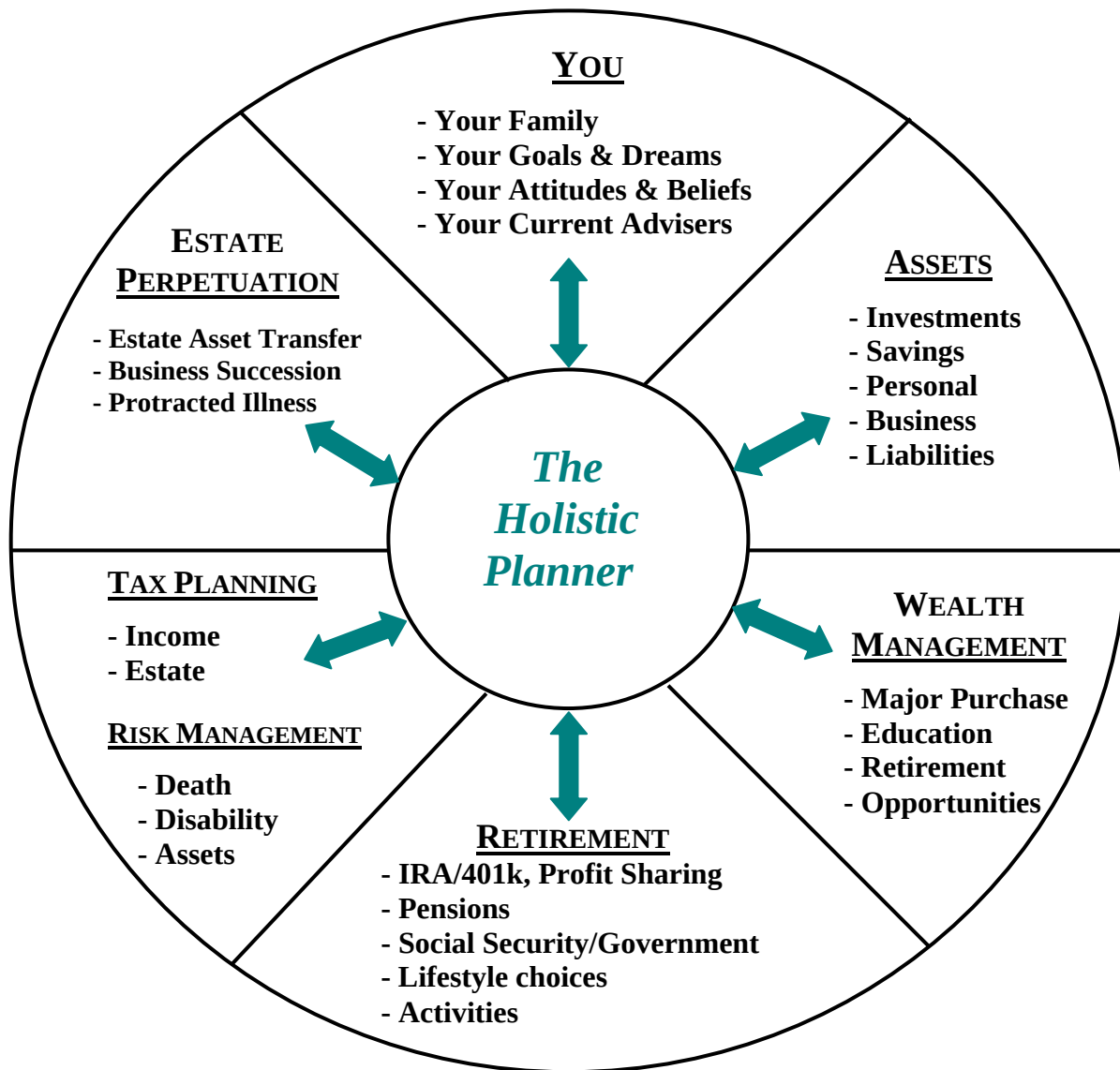


The Holistic Planning Process

The Holistic Planning Process, is a comprehensive financial planning process designed to help coordinate and orchestrate the many aspects of a client's financial life into a cohesive whole. The objective is to give a better sense of where they are, where they want to go, and how to get there.

The following graph illustrates the many dimensions.



The Challenge: Most people have many resources and multiple advisers, but their advisers aren't acting together as a team and their resources aren't coordinated. The client is often left to orchestrate the entire process themselves without adequate knowledge, time, or desire. They often don't know what they don't know. What's needed is a central point for all relevant information to flow to and from.

The above process is used by Jim Adkins and Strategic Financial Associates, LLC. This process is not endorsed or representative of NYLIFE Securities or Eagle Strategies.