BRIGHTER FUTURE BLUEPRINT

PRESENTED BY SUNNY FINANCIAL STRATEGIES

YOUR PATH TO PROGRESS

A Planning System Aligned
with CFP® Standards

Why This System Works for You

The **Brighter Future Blueprint™** is a comprehensive financial planning system designed to provide clarity, confidence, and control over your financial future. Tailored specifically for medical and technology professionals, business owners, retirees, and families, this unified system combines structured analysis, proven methodologies, and personalized professional guidance that empowers you to:

- **Build strategic, long-term wealth** that aligns with your life goals, providing financial stability and allowing you to live more confidently today while helping to secure your dreams for tomorrow.
- **Minimize taxes on current and future income**, helping to ensure you keep more of your earnings and optimize your financial resources through proactive tax planning strategies.
- **Safeguard your hard-earned income**, preserve your assets, and help ensure lasting security and peace of mind for your loved ones through comprehensive risk management and tailored insurance solutions.
- **Support multigenerational financial goals** by creating thoughtful and inclusive strategies that benefit both you and your family, bridging generational gaps and fostering a unified financial vision.
- **Empower your legacy** with purpose and cultural values, ensuring your financial legacy is meaningful, impactful, and reflective of the traditions and principles that define you and your family.

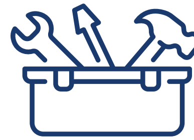
The 6-Step Brighter Future Blueprint™ Process

1. Financial Foundations & Discovery

Outcome: Clear understanding of your current financial position

- **Experience a structured onboarding** designed to make your initial steps easy and thorough. We'll begin by completing a comprehensive questionnaire, analyzing relevant documents, and understand your current or future cash flow needs to identify the important details of where you initially stand.
- **Establish your personalized eMoney financial planning dashboard**, meticulously compiling key financial details including income, expenses, assets, liabilities, insurance policies, and estate documents. This step allows you to have a clear and simplified digital overview of your financial life, saving you time and energy moving forward.
- **Build the foundational layer of our custom Financial Planning Pyramid:** focused on protecting against the "what-if" scenarios critical to an individuals or family's financial security. This includes identifying unexpected risks that may impact what you earn, what you own, what you owe, and those you love.

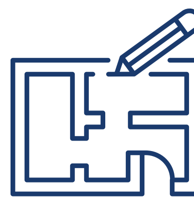
2. Vision Mapping & Multigenerational Goal Clarity



Outcome: Define your personalized vision for a Brighter Financial Future™

- **Collaboratively identify and align** your family's financial priorities and objectives through thoughtful and meaningful conversations.
- **Clearly articulate and document** personal and family goals such as retirement timelines, education and wedding planning, multigenerational support, philanthropic desires, and legacy intentions.
- **Transform your aspirations** into tangible, achievable financial targets that provide you and your family with clarity, motivation, and direction.

3. Strategic Analysis & Tax-Efficient Planning Strategies



Outcome: Identify strengths, gaps, and smarter paths to your goals

- **Conduct a thorough and insightful analysis** of your existing financial strategies, identifying strengths, potential gaps, and opportunities for enhancement in investment portfolios, insurance coverage, and tax strategies.
- **Leverage our proprietary educational tools**, such as the Three Tax Buckets, Insurance Types Chart, and Federal Tax Guides. We will also utilize eMoney's Decision Center to illustrate the positive or negative impact of different strategies, and how small adjustments may have significant long-term value.

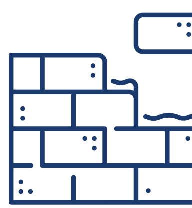
- **Develop customized, data-driven strategies** aimed at maximizing tax efficiency, optimizing risk management, and accelerating your path toward achieving your defined financial goals.

4. Brighter Future Blueprint™ Presentation

Outcome: Receive your clear, visual, actionable roadmap

- **Experience a personalized and engaging presentation** of your Brighter Future Blueprint™, delivered digitally and in PDF format, clearly outlining actionable strategies, timelines, and progress indicators on your Financial Planning Pyramid.
- **Facilitate inclusive family sessions** designed to bridge generational financial understanding, ensuring alignment and harmony with those who matter most to you.
- **Empower your decision-making** with visual clarity and confidence, providing you with actionable insights and clear next steps.

5. Implementation & Professional Coordination



Outcome: Efficient execution and seamless coordination

- When you choose us to implement your financial plan, you will receive **dedicated, hands-on support** as we execute each aspect of your financial plan, from opening and funding accounts to reallocating investments, coordinating insurance needs, and updating beneficiaries.

- **Enjoy seamless professional coordination** with your existing advisors—including CPAs, attorneys, realtors, mortgage consultants, insurance agents, and HR teams—or introductions to our vetted network of trusted professionals.
- **Experience clear communication, proactive updates, and meticulous follow-through**, ensuring your plan is executed smoothly and efficiently, allowing you to remain focused on enjoying your life and doing what you do best.

6. Monitoring, Adjustments & Generational Support

Outcome: Ongoing alignment and adaptability to life's changes

- **Benefit from regular, proactive plan reviews and real-time updates** to your eMoney dashboard, ensuring your financial strategies remain optimized and relevant to market changes, legislative updates, and evolving personal circumstances.
- **Receive comprehensive annual support**, including detailed cash flow management, mid-year tax strategy sessions, estate plan clarity, investment reviews, and insurance evaluations. Providing sustained clarity and confidence throughout your financial journey.
- **Gain continuous guidance and dedicated support** through major life transitions—including college funding, job transitions, real estate transactions, selling a business, retirement, family caregiving, weddings, legacy planning, and managing inheritances—ensuring you and your family can thrive in every season of life.

Why Clients Choose the Brighter Future Blueprint™

Customized & Culturally Fluent:
Personalized strategies aligned with your unique financial goals and cultural values.

Visual Clarity:
Intuitive educational tools and processes that are designed to simplify complex concepts and strategies.

Technology-Enhanced:
Robust, real-time tracking and collaborative transparency via your personalized financial planning website.

Execution:
Dedicated professional support ensuring smooth, efficient, and timely implementation, so your financial plan moves forward with clarity, rather than costly procrastination.

Long-Term Partnership:
Ongoing, fiduciary relationship in our investment advisory services that provide continuous education, value, and strategic optimization.

In Closing

The Brighter Future Blueprint™ is more than a financial plan—it's a structured, CFP® aligned process designed to organize your finances, grow your wealth, reduce taxes, and protect your family. Supported by advanced planning tools, professional coordination, and educational resources, we help you achieve clarity today and confidence about your future.

Let's begin building your Brighter Financial Future™ today.

As a Financial Advisor, Tom Sunny strives to provide his community and clients with optimal strategies and solutions to help them grow, protect, and conserve their wealth through all stages in life, and create a legacy based on their unique needs and goals. Although we know financial planning can be daunting, we lead with an educational approach to make sure individuals, families, and businesses understand their options and are well-informed.

Schedule Your Free Strategy Session!

Tom Sunny, CFP®, CLU®, RICP®

847.585.4931 SunnyFinancial.com tom@sunnyfinancial.com