

# THE BLANKINSHIP & FOSTER WAY

Our proven process brings clarity, confidence and direction to your finances.

## DISCOVER



Understand your situation and what's important to you.

Learn about our services and philosophy.

Develop goals, objectives and vision of your future.

## CLARIFY AND ORGANIZE



Gain clarity about your resources, opportunities and challenges.

Summarize the components of your finances.

## DESIGN



Design the right investment portfolio for you.

“Getting to How”: Create a game plan to maximize planning opportunities.

Integrate planning across investment, tax, retirement, estate, and more.

## IMPLEMENT AND MANAGE



Implement your plan in “Bite Sized” action steps.

Proactively manage your investment portfolio.

## ONGOING GUIDANCE



Meet and review with you regularly to keep your plan on track.

Prepare for expected and unexpected life events.

Adjust planning and investments as changes happen.