

Introductory Meeting

Review, Assess & Evaluate

Internal Planning Process

Revise Plan

Present Initial Plan, Recommendations and begin implementation

Securities Offered Through ValMark Securities, Inc. Member FINRA, SIPC Investment Advisory Services Offered Through ValMark Advisers, Inc. a SEC Registered Investment Advisor 130 Springside Drive, Suite 300 Akron, OH 44333-2431 800-765-5201

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