Wealth Health Check-Up™

Find Out if Your Family Is On Track for a Secure Future!

The first step to building wealth and a life with less stress and fewer worries is getting control over your financial situation today.

The Wealth Health Check-Up™ is similar to a medical check-up. We'll look at every aspect of your financial well-being. We'll identify strengths and offer you ways to build on those strengths while protecting yourself from the risks of your particular situation (and there are ALWAYS risks).

For a low, flat fee you will get a complete "bumper to bumper" review of your current financial situation, answers to your questions, an understanding of the financial tools you already have and ideas on what your next steps might be.

<u>WHAT YOU GET</u>

- Two hours with a Wealth Coach and CERTIFIED FINANCIAL PLANNER™ professional.
- A complete review of your current financial situation.
- Answers to your most pressing financial questions.
- Access to great resources including our web-based modeling and planning software for 30 days.

We created the Wealth Health Check-Up™ to provide you with access to the knowledge, experience and perspective of a CERTIFIED FINANCIAL PLANNER™ Professional - but at a reasonable cost and with no sales pitches, obligations or strings attached.

<u>BENEFITS</u>

When our meeting is over you will:

- Understand the basic elements of your personal financial situation including an understanding of each financial product you currently have.
- KNOW what you must do to achieve the things in life that are most important to you.
- Sleep better at night with less stress and fewer worries about money.

For many people, a Wealth Health Check-Up™ is all that is needed each year to stay on track financially. Many folks don't need monthly meetings, an expensive leather binder or sales calls from someone every quarter.

You just need a trusted advisor (a financial professional) to make sure everything is OK and to be available should something come up when you do need help.

WEALTH HEALTH CHECK-UP

A complete review of your Wealth Health …

… So you will KNOW that you are on track to a Secure Future for your Family

LOCATION - Our office

FEE: ***$397***

(all inclusive - no surprises)

THE HELP YOU NEED FROM A QUALIFIED EXPERT

Your Wealth Health Check-Up™ will be done by John D. Buerger, CFP®

John is an independent CERTIFIED FINANCIAL PLANNER™ professional who has pioneered the ALTUS Process™. This process blends the best of financial planning and personal development knowledge and expertise.

This is a fee-only engagement.

It <u>is</u> <u>not</u> a sales pitch - We simply want to provide you with the tools you need to get control over your money … at a reasonable cost.

Ask about our 100% Satisfaction Money-Back Guarantee!

The Wealth Health Check-Up™ includes free access to our web-based financial modeling and planning software for 30 days. Continued access is only $19.95 per month.

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Wealth Health Check-Up

Frequently Asked Questions

What Do I Need to Bring to the Meeting?

There are a number of documents you will need to gather and information that needs to be collected and entered into our secure, web-based financial planning software before our meeting. You will receive a letter explaining all the details. Expect to spend a couple hours getting your financial information together and organized.

Why Do You Charge $397? Why Not For Free?

We realize many investment houses will provide you with a free first meeting to get you to come in. But then you have to wonder, "What do I have to buy? What products are they going to try to sell me? How are they getting paid for this?"

As in all industries, in the investment world you "get what you pay for."

We offer good advice at a fair price and an **unconditional guarantee:** If you are not completely satisfied with the value that you receive … we will refund your fee completely.

What Are You Going to Try to Sell Me?

Absolutely nothing. The purpose of this meeting is to accomplish a complete review of your current financial situation. We will also answer as many of your questions as we can in the two hours AND leave you with some financial planning tools you can use to get control over your money before it takes control of your life.

Information on Your Wealth Coach - John D. Buerger, CFP®

John is a CERTIFIED FINANCIAL PLANNER™ professional and fiduciary advisor with ALTUS Wealth Solutions - an independent Registered Investment Advisory firm not affiliated with any Broker/Dealer or Wirehouse. He has been helping clients make smart choices with their money since 2003.