

# From core needs to big dreams

Begin with an open dialogue and deep discovery with your advisor of what you want out of life. With that discovery, you'll journey on an investment path that's unique to you.

## Getting there

1. Financial issues affect everyone differently
2. An advisor should invest time in getting to know you
3. You should feel free to share your goals, dreams, and worries
4. You want choices you can understand
5. You like opportunities being shared and cautions given
6. Through it all, you want to feel prepared, informed, and valued

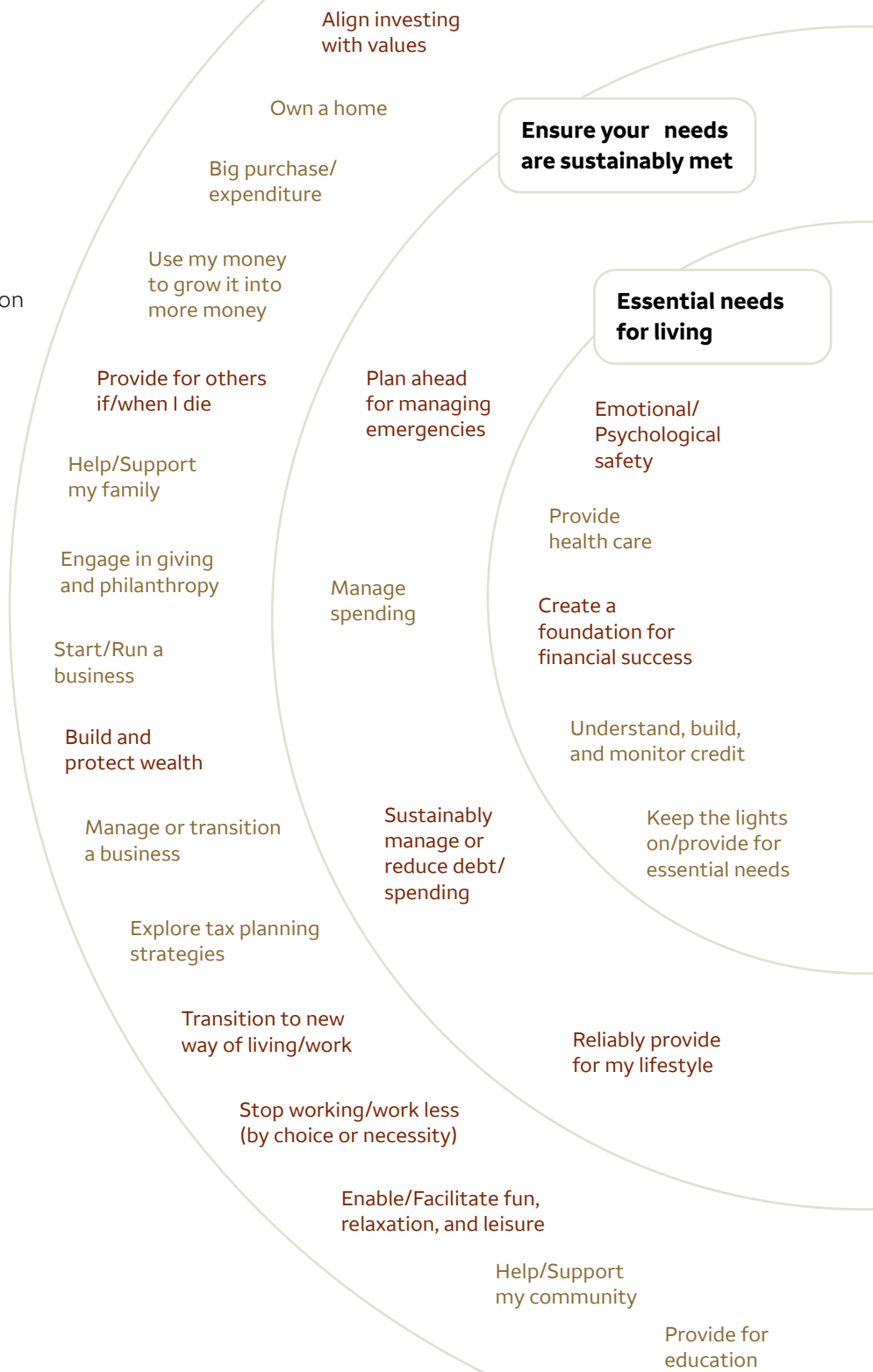
- Emotional/Psychological goal
- Dollar goal

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**Putting your money to work and accomplishing what matters most to you**

**Ensure your needs are sustainably met**

**Essential needs for living**



**Investment and Insurance Products: • NOT FDIC Insured • NO Bank Guarantee • MAY Lose Value**