

# Stage 2 Alignment Conversation

How to find out if you're a good match for us and we're a good match for you.



## Where are you now?

What's going on in your life now? We want to learn who you are and what you want. It's the baseline for our conversation.

## Where do you want to be?

If we were to get together three to five years from now, what would have to happen for you to feel personally and professionally successful?

## What's the gap?

What's the difference between where you are and where you want to be? This helps both of us know what the value could be with working with us.

## What's the value?

If we are able to help you go from where you are to where you want to be, what's the value?

## Do you want help?

This is where you decide if you want help from someone like us, or do you want to go it alone. If you want help and we think we can provide value we will do so. If not, we'll help you find a place that fits your needs.

## Let's get started!

Let's get started in finding innovative ways of getting you to manage the transitions and financial challenges that come with the transitions you might be facing.

## Make an appointment

[Click here](#) and set a time for us to talk and see if we're aligned with your needs.