

# The Focused Holistic Approach™

## to Financial Planning

The Focused Holistic Approach™ helps you focus on your most important goals and achieve them in a values based, holistic fashion. The Focused Holistic Approach™ will help you improve the quality of your life, protect and empower your family, and achieve your goals.

### The Success and Opportunity Review™

Regular review sessions that acknowledge your progress to help you take advantage of new opportunities as they arise.

### The Structured Implementation System™

An integrated system of resources and capabilities dedicated to the efficient and effective implementation and evaluation of your plan.

### Your Vision Fulfillment Plan™

Your personal plan outlining actions, time lines, and benchmarks for achieving your goals.

### The Breakthrough Planning Session™

A planning session that identifies obstacles you face, develops strategies, and chooses appropriate tools for achieving your vision.

### The Vision Clarity Workshop™

Helps you voice what is really important to you, clarifies your focus in life, and considers your present financial circumstances.

### The "Getting to Know You" Starter Kit™

Helps you gain greater clarity about your financial habits, assets, and liabilities.



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# HANSEN'S

ADVISORY SERVICES, INC.

*"Investing in companies that give a hoot"*

## Financial Planning

Retirement Planning

Investment Planning

Insurance

Estate Planning

Tax Planning

Life Planning

In addressing these issues, we use tools that help lead you forward such as:

The Values Connection

The Goal Advantage

The Roots of Money

The Aspirations and  
Opportunities Worksheet

## Financial Consultation

Answering your specific questions about spending, saving, asset protection, taxes and investing.

## Investment Management

Asset allocation of your portfolio based on your values and goals with attention to investments in responsible corporate citizens.

### Susan S. Hansen

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