

## Choose Your Route to Financial Wellness

Unsure where to begin? Try our FREE Financial Playbook to get started!



### Financial Playbook

**FREE**

Putting your financial life & retirement on-track doesn't need to be complicated or costly.

(<http://www.cxwealthdirect.com/sign-up>)



### Financial Coaching

**\$25 PAYROLL DEDUCTION**

Our coaches will work One-on-One with you to build a personalized plan and be your accountability partner.

(<http://www.cxwealthdirect.com/sign-up>)



BrokerCheck by FINRA

# Investment Management

**MINIMUM INVESTMENT OF \$5,000**

We build low cost, tax sensitive strategies, free from emotion to help pursue your goals.

(<http://www.cxwealthdirect.com/sign-up>)

## Take charge of your financial future

Managing your money can be stressful – but it doesn't have to be. CX Wealth Direct provides the tools you need to strategize and save successfully. Together, we'll create a roadmap to help you pursue the financial goals that matter most to you and your family.

We'll begin by creating a distinct, online snapshot of your personal finances. Your easy-to-access dashboard helps you connect the dots, seeing precisely where you are in your journey to financial success. And, when you enroll in our coaching services, you'll have access to a wealth of wisdom and advice.

Take charge today. Create a financial plan that will grow with you as your travel from one stage of life to the next. And don't worry – we intend to be there as you reach every important milestone along the way.

Begin the Journey (<http://www.cxwealthdirect.com/sign-up>)

Check the **Background** of your financial professional on FINRA's [BrokerCheck](http://brokercheck.finra.org/)