

Plan Now for Your Future

Scott Sanford and his team (Roger Pierce and Sherri Gilligan) at Harmony Private Client Advisers believe that financial success doesn't happen by chance. It has much more to do with choice. Transforming aspirations into actuality takes acumen, hard work, discipline and strategic financial planning.

When it comes to your financial goals, each decision you make and action you take will have a significant impact on your future financial circumstances. A good financial blueprint will lay out what you need to do today to achieve your goals tomorrow.

When it's a matter of planning for the future, realizing the need to take greater control over your financial life is the first step. Choosing someone who has the ability and resources to best address those needs is the next. That's where Scott Sanford and his Harmony team comes in.

Scott Sanford and team Harmony utilize a four-step process to help you plan for the future and help protect you if life takes an unexpected turn.

- **Ask you questions:** Before we can advise you about any of the strategies that might be appropriate in your situation, we need to learn about you.
- **Analyze the information:** Scott Sanford and team Harmony provide you with a comprehensive plan that compares what you have with what you want and identifies any gaps.
- **Make recommendations:** Scott Sanford and team Harmony prepares a detailed plan that includes a review of what you have already done, and some recommendations about what you may need to do next.
- **Keep in touch:** Nobody's situation stays the same. As yours changes, Scott Sanford and team Harmony will review your plan, and suggest revisions to help ensure that it keeps pace with your changing situation.

Scott Sanford and Harmony Private Client Advisers is committed to ensuring that your family's needs will be met with care, expertise, and an understanding of your unique circumstances and individual goals.

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