



the Owners Box View Experience

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Personal financial planning is the process of managing your money to achieve personal economic satisfaction. This planning process allows you to control your financial situation. Every person, family, or household has a unique financial position, and any financial activity therefore must also be carefully planned to meet specific needs and goals.

Our powerful proven 5 step comprehensive financial process is specifically designed to enhance the quality of your life and increase your satisfaction by reducing uncertainty about your future needs and resources.

JML Financial Group is with you every step of the way as your financial coach. Welcome to the Team!

Joe Yocavitch



1. FAMILY HUDDLE CONVERSATION

A discussion to provide a clear understanding of your objectives and obstacles is the first step.

BENEFIT: Our clients gain clarity and organization.

2. THE DIAGNOSTIC REVIEW

A macroeconomic model provides an overview of your current financial picture. We will identify how assets and liabilities are being used and analyze the impact and validity of your present strategies.

BENEFIT: Comprehensive view of your financial picture revealing its strengths and weaknesses.





3. THE OFFENSE/DEFENSE STRATEGIES

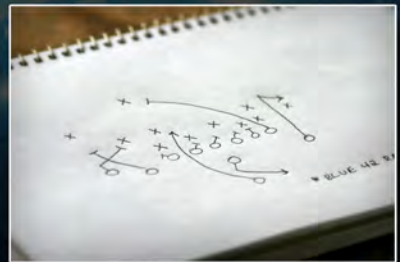
We work together to help ensure sufficient protection from death, disability, lawsuits, unnecessary (estate) taxes, and unintended consequences of estate distribution. Next, appropriate growth strategies are explored.

BENEFIT: Confidence knowing individual strategies will be developed to help deliver optimal growth and maximum protection for you and your family.

4. THE FINANCIAL PLAYBOOK

An outline including actions responsibilities for both you and your financial professional to ensure complete understanding of the implementation process.

BENEFIT: A blueprint of where you are and where you want to be.



5. THE ECONOMIC REVIEW SESSION

This will allow us to regularly re-evaluate and provide new strategies as changes in your life occur.

BENEFIT: A flexible model that will guide you now and in the future.

Ready To Get Started?

Visit JMLFinancialGroup.com to start a conversation about your **Owner's Box Experience!**
Procrastination is our biggest form of self-sabotage. Start the conversation today!



*A*t JML Financial Group, helping you achieve your vision for retirement is our number one goal. We work closely with you to assess your individual retirement strategy, and help provide strategies tailored to your needs. JML Financial Group are proud to be independent financial professionals.

Joe Yocavitch is registered with and securities and investment advisory services are offered through Brokers International Financial Services, LLC. Member S.I.P.C. Brokers International Financial Services LLC is not an affiliated company.