CLIENT & MEMBER FACT SHEET • ESTABLISHED 2018

Mosley Consulting and Financial Services

"Taking your dreams further than you imagined." • Personal Financial Coaching Nationwide

★★★★★
5.0-Star Rated on Google
Trusted by Families Since 2018

Why Families & Individuals Work With Us

The Mosley Financial Wellness & Wealth-Building Framework

Real Data & Why It Matters: Financial success is more than simply making more money: it is about understanding the money you have, building disciplined habits, and creating a strategic pathway to lasting wealth. Nearly 3 in 4 Americans feel stressed about monthly bills, debt, or retirement readiness, while households guided by a written plan and a dedicated **Financial Strategist** on our **monthly subscription plan** are more than twice as likely to eliminate debt on schedule and build lasting financial freedom. We serve individuals, couples, families, and small businesses **nationwide** (meeting 1-on-1 via Zoom, phone, or in person).

Nationwide Platform	100% Complimentary	1-on-1 Accountability	5.0-Star Rated
Zoom, Phone & In-Person	First Strategy Session	Monthly Subscription Plan	Verified Google Reviews

OUR SEVEN PILLARS FOR SUCCESS PLANNING

Understand • Stabilize • Reduce • Organize • Plan • Build • Protect

1 Financial Clarity: Understand Where Your Money Goes
We capture and review all income and expenses (housing, food, debt, subscriptions, and insurance) to eliminate waste, improve monthly cash flow, and give every dollar a clear purpose.

2 Financial Stability: Prepare for Life's Unexpected Events
We help you build a dedicated emergency safety net reserved for true necessities (food, clothing, shelter, and transportation) so unexpected events never become a financial crisis.

3 Debt Management: Reduce Financial Obligations
We map every creditor, balance, interest rate, and term to establish a disciplined strategy that prioritizes debt, lowers interest costs, accelerates repayment, and frees up cash flow.

4 Asset & Savings Management: Know What You Own
We organize a complete inventory of your checking, savings, money market, CD, investment, and retirement accounts so your resources are positioned for both today and tomorrow.

5 Strategic Goal Planning: Turn Life Goals into Strategies
For every milestone (buying a home or vehicle, starting a business, funding education, or **Full Retirement Age** and Social Security timing), we map the Goal, Cost, Timeline, Strategy, and Action Plan.

6 Wealth Accumulation: Build Resources for Tomorrow
Once your foundation is strong, we build disciplined habits to Save, Invest, Grow, Compound, Diversify, and Preserve long-term wealth across 401(k), 403(b), Traditional and Roth IRA, and investment accounts.

7 Financial Protection & Legacy: Protect What Matters • Prepare for the Future • Leave a Legacy
Building wealth matters, and protecting what you build matters just as much. We help you evaluate life, disability, and long-term care insurance, wills, trusts, powers of attorney, and beneficiary designations so your family can **LIVE • GIVE • LEAVE A LEGACY**. Every journey starts with a 100% free, confidential **Complimentary Strategy Session**.

How to Share Us With Someone You Care About (3 Easy Ways)

1. Share Our Booking Link
www.calendly.com/mosleyconsultingllc
Invite a friend, colleague, or family member anywhere in the country to book a Complimentary Strategy Session.

2. Leave a Quick Google Review
https://g.page/r/CWKv5Ry7EWDAEBI/review
Your honest Google review helps families searching online find a trusted Financial Strategist they can count on.

3. Forward This Sheet or Introduce Us
(810) 269-7650 • dmosley@mosleycfs.com
Forward this sheet or visit **www.mosleyconsultingllc.com** to connect someone you care about anywhere nationwide.



David W. Mosley Jr.

CEO and Founder, Mosley Consulting and Financial Services

"We don't simply look at today's finances. We meet you where you are and walk alongside you to establish a disciplined strategy for your money, your future, and your legacy."

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