




**C**REDENTIALLED  
**F**INANCE  
**E**XPERTS

*Long-term financial  
strategies for early  
and traditional  
retirement*



The secret to  
getting ahead  
is getting started.

- MARK TWAIN

## WHO WE ARE



### Financial Planning - Inspired by You

Everyone has a financial story, and we believe in the power of stories both to make sense of the past and to plan for the future. That's why our process always starts with listening.

We are a team of credentialed CERTIFIED FINANCIAL PLANNERS™, CHARTERED RETIREMENT PLANNING COUNSELORS™, and CHARTERED FINANCIAL ANALYSTS who are committed to understanding your financial journey and retirement goals, whether retirement is planned for age 40 or age 70. We understand that unexpected events and life changes can impact your dreams. We create financial plans jointly with you and based on where you are now, not where others think you should be.

We do not have preset financial products that we sell. Instead, our focus is on uncovering recommendations that are tailored to your situation. We employ a comprehensive planning approach combined with sophisticated technology designed to optimize your results and help achieve your financial goals.

We have years of experience collaborating with clients like you. We believe your financial information should be organized, up to date, easy to understand and accessible to you whenever you want, from wherever you are.

This is why we say that our brand of financial planning is inspired by you - because it's your story. Let's talk today.

As your financial advocate, your success  
is our success.

# Our Planning Process Can Help You Achieve Your Financial Dreams

We start by helping you identify your goals and evaluate where you are relative to those goals.

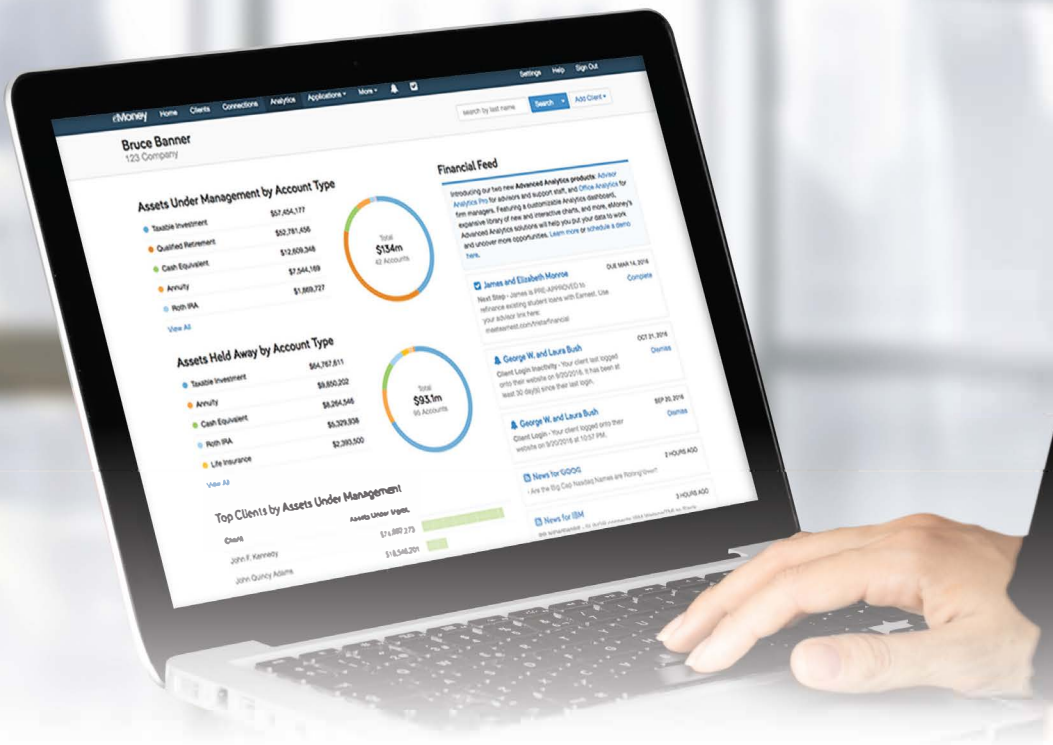
We evaluate your options and recommend strategies to help you get you where you want to be.

We don't stop there. We help you implement the recommendations. Then, we continually monitor your financial situation to ensure you remain on track to achieve your financial dreams.

Your goals remain the centerpiece of our recommendations and strategies.

## WHAT WE DO





# HOW WE DO IT

We take a comprehensive view of your complete financial picture to develop a deeper understanding of what is required to achieve your goals.



## Complete Financial Picture

We link all your financial accounts for a complete and up-to-date view of your financial situation. Our analysis and recommendations are comprehensive and reflect current market conditions.



## Monitor Progress

With a daily snapshot of your progress, we can alert and remind you of financial factors that may impact your ability to achieve your goals. This relieves you of organizational burden, allowing you to focus your energies on what matters most in your life.

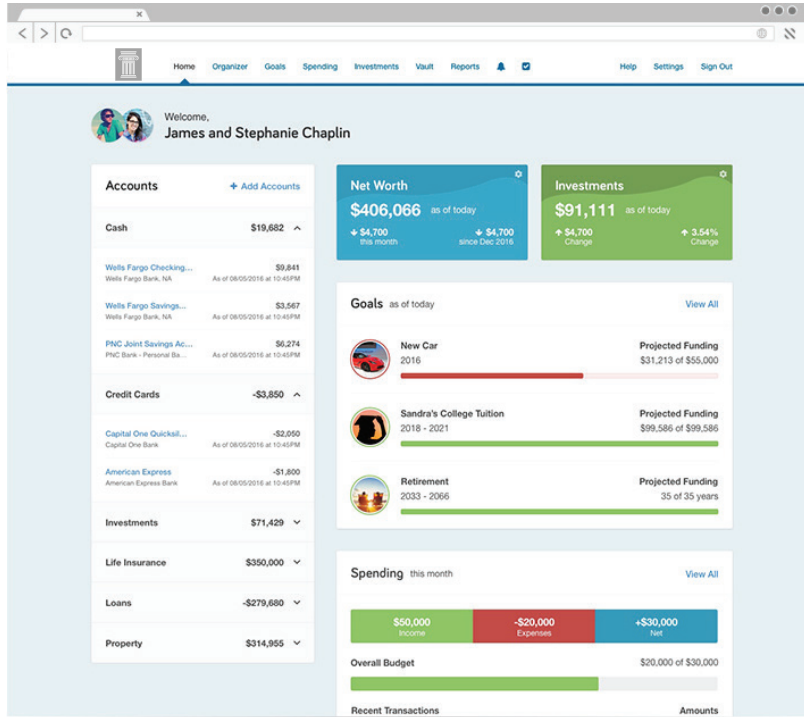


## Increased Collaboration

Our wealth management system provides both you and our team with a secure view of your financial progress. We can collaborate with you online at anytime, no matter where you are.

We make your life easier by providing unique services for staying organized, updated and prepared.

## Personal Financial Website



WHAT WE PROVIDE



### Organizer

Connect all your accounts for a consolidated view of your entire financial picture.



### Budgeting Tools

Set budgets to help reach your savings goals.



### Track Spending

Know how much you're spending, and where.



### Mobile

A complete financial picture available on your smart phone.



### Investments

Interactive charts and detailed views help monitor all your accounts.



### Vault

Safely store your most important financial documents, accessible 24/7.



### Screen Sharing

Join a screen sharing session quickly and easily for interactive planning anytime, anywhere.



### Goals

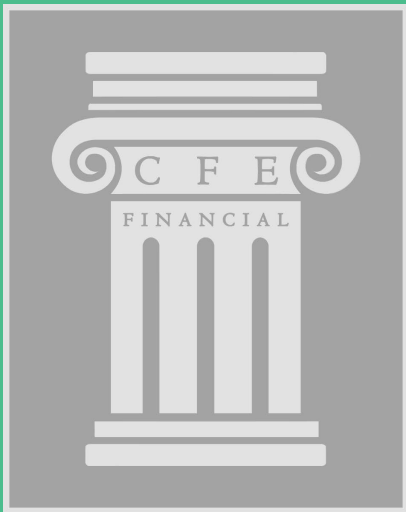
See if you're on target to reach your most important goals.





The gratification of wealth is not found in mere possessions or in lavish expenditure, but in its wise application.

- MIGUEL DE CERVANTES



**Marco Rimassa,**  
**CFP®, CRPC®, CFA**

*President, CFE Financial*

713-550-2518

[info@cfefinancial.com](mailto:info@cfefinancial.com)

[www.cfefinancial.com](http://www.cfefinancial.com)

