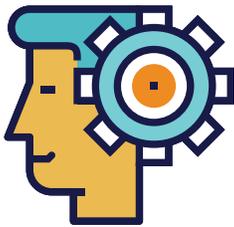


5 BENEFITS OF A STONE STREET LIFE PLAN



1 YOU'LL HAVE A REALISTIC VIEW OF YOUR CURRENT SITUATION.

A Stone Street Plan starts with what we call a "Reality Check."



You'll take an inventory of the current state of the four primary areas of your financial life –

what you have



what you owe



what you make



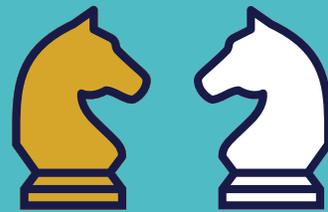
what you spend



This information serves as the starting point for your plan and – don't worry – the journey of a thousand miles begins with the first step and this is it!

2 YOU'LL HAVE A CLEAR VISION OF YOUR IDEAL LIFE.

We will walk you through a process of self-discovery that helps you outline what's important to you.



This will help you crystalize

who you want to be



what you want to do



where you'll do it



with whom (if anyone) you'll do it with



This step isn't about money, it's about the type of life you want your money to provide.

3

YOU'LL KNOW WHAT IT TAKES.



After we've walked through the **Reality Check** and **Defined Your Stone Street Life**, you'll have the tools to be able to determine what you have to do to "**BRIDGE THE GAP**" between where you are right now and the life that you really want.

4

YOU'LL HAVE A ROADMAP THAT CAN SERVE AS A BAROMETER FOR MAKING DECISIONS.



Should you buy a new car or drive the one you have for one more year?

Should you rent or own your vacation home?



When you have an understanding of both your current situation and the life you want (along with your numbers), it's much easier to make the financial decisions that you face on a daily basis.

5

YOU'LL HAVE STRATEGIES TO HELP YOU BUILD THE LIFE YOU WANT!



As part of developing your Stone Street Plan with you, we'll share strategies that you can use to:

make saving automatic, evaluate your expenses periodically to reduce your spending (on things you may not need,) and many other tips for keeping your plan on track. We'll also offer you customized suggestions and insights designed to move you forward toward your Stone Street Life.



THE BOTTOM LINE

Building a Stone Street Life for yourself goes beyond just putting money away in a company-sponsored retirement plan. At **Stone Street Wealth Management**, our dedicated team is here to help you take the steps toward reaching your goals.

