

# Planning R.I.G.H.T. For Retirement.

| Risk, Income, Growth, Healthcare, Tax |

Helping you spend more time ENJOYING LIFE and less time WORRYING about your money!

The goal of this process is to create an easy path to answering three questions:

1. Can we help you?
2. Do you want our help?
3. Are we a good "Fit" for a long-term relationship?



CENTENNIAL ADVISORS, LLC

HELPING YOU RETIRE WELL

## DISCOVERY

Complete discovery process to learn your goals and concerns.

## STRATEGY

Can we help?

## PLANNING

Details on working together.

## WELCOME

Welcome to Centennial Advisors!



- Review previous meeting
- Analyze income plan
- Review risk
- Stress test
- Analyze tax projection
- Explore liquid, income, and growth allocations

- Review previous meeting
- Income plan
- Growth plan
- Stress test
- Advanced planning discussion

Choose to engage with Centennial Advisors

- Onboard with client portal
- Complete paperwork to start your R.I.G.H.T. Retirement Planning.
- Planning for taxes, health, and estate.

Worry less about your money and start enjoying life more!