

You have big aspirations.
But aren't quite sure where to start.

**We're not just financial planners,
we're dream architects.**

WH Cornerstone Investments knows that financial planning is not just about the numbers: it's a strategic plan for your life.

It is at the intersection of life planning and financial planning that amazing results can occur.

Our five step process provides you a comprehensive process to identifying and capturing your unique goals and dreams.

Our main objective is to help you achieve more of the things you value in your life sooner.

Begin it.™

WH Cornerstone
Investments



WWW.WHCORNERSTONE.COM



Financial Planning





Getting a baseline of where you are and visioning for the future.

QUESTION ONE

If we were meeting here three years from today—and you were to look back over that time—what has to have happened during that period, both personally and professionally, for you to feel happy about your progress?

QUESTION TWO

What is getting in your way of moving forward?

List the three biggest dangers to be eliminated.

QUESTION THREE

What gets you excited?

List the three biggest opportunities to be captured.

QUESTION FOUR

What is going right?

List the three greatest strengths to be maximized.

