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January is named after the Roman two-faced god #Janus. It's time to look back at what you've achieved and look forward to what you've got to do.

JANUS

Looks to the past ←



→ Looks to the future

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3 solid reasons to review your #financialplan in 2021. Are you confident that your financial plan is still relevant and adaptable? Are you in the best of #financial health?

Instead of first thinking about when we should review a financial plan, we should understand why financial plans need to be reviewed.

There are three solid reasons:



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You are not the only one influencing your #financial future! We show you how the world is influencing your financial outcomes. Tell us how you tackled these changes in the comments below!



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We recommend reviewing your plan every year. What we've done for clients during reviews. To review your #plan today call +919500027285!

#financialplanning

Through this annual review process, we've helped clients:

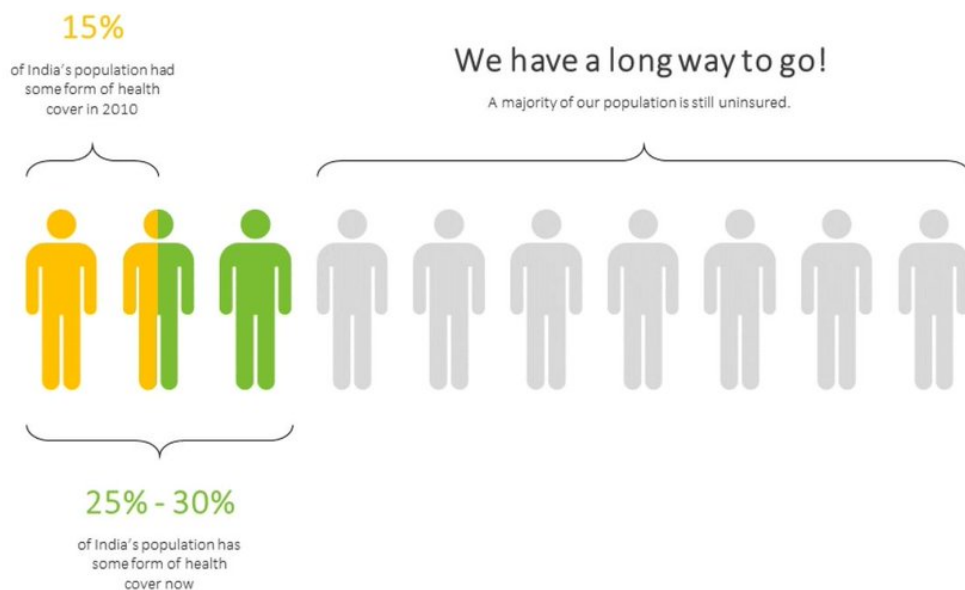
- Identify and contest drops in their credit scores
- Replenish their emergency funds
- Reassess their insurance needs
- Renegotiate loans
- Address behavioral challenges or blind spots

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What triggers people to take #financialplanning seriously?

1. Medical emergency
2. Career transitions

Did you know only 25%-30% of our population has health #insurance?



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3 Ways Your #Career Influences Your Plan.

How Do Careers Influence The Frequency of Reviews?



SOURCE OF INCOME

Self Employed
Business
Salaried



CASH FLOWS

Raise
Pay cuts
Bonus



CAREER BREAKS

Retirement
Sabbatical
Job Transition

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What's the most common financial mistake?

The most common financial mistake?

**WE DON'T MAKE THE MOST OF
OUR GOOD TIMES.**

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Nothing is set in stone.

Learn to adapt to your financial situations in good times and in bad with #financialplanning!

DM to get started.

Contact us today to book an
appointment!



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