CREATE YOUR

Financial Future

"**Success** doesn't come from what you do *occasionally*, it comes from what you do **consistently**"

Marie Forleo

What to Expect

MEETING 1

DISCOVER
What are your values and goals? How can we be your partner to work toward your goals?

MEETING 2

GATHER
Review your financial facts with source documents and logins.

MEETING 3

PLAN
Review budgeting recommendations and create a budget.

MEETING 4

SOLUTIONS
Create an action plan and accountability schedule for your goals.

Ongoing

Continue to re-evaluate your plan with periodic meetings that suit you; annually, semi-annually or quarterly.

AVAILABLE

Services

We're here to help you create a personalized strategy based on your lifestyle, values and goals. Using our process, we take the time to **understand** your individual goals, **educate** you on available options and work with you to find fitting financial **solutions**.

As registered representatives of LPL Financial, we have access to a multitude of financial solutions, allowing you to pursue your financial and business goals.

There are over 130 potential financial topics we can cover; below are just a few examples:

Investment Planning

Retirement Planning

Insurance Planning

Your *goal* is our *focus*

As experienced professionals with over 30 years of combined experience, Brooke & Claire, CFP® are known for helping, educating and supporting clients as they develop strategic financial plans for the future.

Their passion is to partner and help clients and their families achieve their financial *dreams*.

RB Wealth Management

Outside of work, **Claire & Brooke** enjoy spending time with their families and volunteering with various organizations in their community.

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RB Wealth Management

Claire Walmer, CFP®

VP Wealth Planner
608.400.2428

Brooke Palmer

LPL Financial Advisor
608.381.9582

Email
rbwealthmanagement@lpl.com

RB Wealth Management

Located at Royal Bank

www.royalbank-usa.com