Plan with confidence

At Sloan, Giguere, Gisleson & Associates, we take a personalized approach to helping our clients meet their financial goals. We make it a priority to get to know you, your loved ones, and all your dreams for the future. No matter how big or small your goals may be, you can count on us to help get you closer to achieving them.

1 Establish a foundation
Organize your everyday finances, eliminate debt, and create a strong financial foundation.

2 Protect against risks
Protect your income sources and plan for risks that could undermine your goals.

3 Grow over time
Develop saving and investment strategies to help you achieve your goals.

4 Achieve your aspirations
Discover the financial freedom to reach your personal goals and impact your loved ones.

Our services and how much they cost

ADVANCED PLANNING STRATEGIES	PERSONALIZED FINANCIAL PLAN	INVESTMENT MANAGEMENT	FOUNDATIONAL ADVICE
Includes a personalized financial plan and a deeper dive on advanced planning topics.	Includes a full assessment of your finances or if you prefer, just one or two areas of your financial life.	Includes asset allocation and rebalancing, innovative risk management, portfolio enhancement, and tax planning strategies.	Includes a high-level analysis and solution(s) for a specific need.
Who is this good for? If you have more complex assets, tax, and/or legacy planning needs. We'll coordinate with outside professionals like your CPA or attorney.	**Who is this good for?** If you just don't know where to start, have never worked with a financial planner, or if you're looking for a second opinion on an existing financial plan.	**Who is this good for?** If you're looking for someone to manage and help enhance your investment portfolio. We'll meet quarterly or annually to review your portfolio's performance and strategies to help mitigate risk.	**Who is this good for?** If you have a specific need that doesn't require a full analysis, like purchasing a life insurance policy or setting up an individual retirement account.
Cost: **Fees can range from $1,500 to $15,000 depending upon complexity of the engagement and other factors.**	**Cost:** **Fees can range from $1,500 to $15,000 depending upon complexity of the engagement and other factors.**	**Cost:** **Quarterly fees based on platform chosen and account size.**	**Cost:** **No fees. Commissions earned on product and/or investment sales.**

ONGOING FINANCIAL ADVICE

Includes the continuation of our financial advice and guidance after your financial plan has been delivered.

Who is this good for?

If you're looking for an ongoing relationship for your financial plan. We'll meet regularly to monitor your progress and adjust your plan as your life and priorities change.

Cost:

Fees can range from $600 to $15,000 depending upon complexity of the engagement and other factors.

You have a choice to implement the recommendations in your financial plan on your own, with your Financial Planner or through another financial services professional. If you choose to implement your plan with your Financial Planner, he or she may sell other services and products to you in his or her capacities as (i) an investment adviser representative ("Advisory Representative"), (ii) registered representative of Pruco Securities, LLC, and/or (iii) a licensed insurance agent of Prudential (collectively "Prudential Representative").

Prudential

What to expect: The financial planning process

DISCOVER	ANALYZE	ACT	EVOLVE
• Understand what is most important to you • Share how we can work together to help achieve your goals • Collect necessary information to begin an assessment of your current financial situation	• Complete an analysis and strategize on options to achieve your goals • Collaborate with trusted advisors like your accountant or tax professional • Leverage our team of specialists, resources, and tools	• Present recommendations and prioritize your options • Create an action plan to help empower your decision-making • Agree on next steps to start your journey to a successful financial future	• If elected, meet regularly to check on your progress toward reaching your goals • Adjust your plan as your life and priorities change • Continue this process through an ongoing relationship

Your future is important to you. And to us.

Together, let's create a custom financial plan to help reach your goals.

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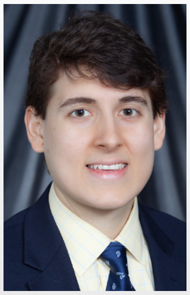

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