

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](http://WWW.WHCORNERSTONE.COM)



*Financial Planning*



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

## The Future Advantage™

Through a series of thought provoking questions, we explore what means the most to you in your future.

## The Discovery Experience™

Through a cash flow analysis we gain an understanding of what's coming in and what's going out. We will develop personalized financial ratios. We capture your one to three year goals and then start to craft strategies to help you achieve them. We measure your tolerance for risk. Most importantly, we take an extra step to understand your natural instincts so we are able to deliver information customized to you.

## The Protection Analyzer™

Things are getting in the way of your moving forward. This important step addresses the most urgent and important pieces of your financial life. We make sure you are protected by eliminating unnecessary risk.

## The Total Asset Optimizer™

When your assets are working in harmony, you have a higher likelihood of achieving your financial goals. We will work with you to help you balance your existing assets and to develop strategies to accumulate new assets.

## The Enlightenment Navigator™

Life is not static and neither is your plan. An important step in achieving your plan is to continue to monitor, measure, and when necessary modify. We also take the time to celebrate from where you started to what you have been able to achieve during the planning process.

