

# Contemporary Financial Planning Second Opinion Service



In this challenging economy, you probably know a friend, family member or client who may be in a complex situation or just unhappy with the advice from their financial professional. It's not uncommon. We have found that majority of high-net-worth investors would value a **second opinion**.

In order to help the people, you care about achieve their financial goals, we have created **Our Complimentary Second Opinion Service**. We're pleased to offer your friends, family, and clients some of the same expertise and guidance that you've come to expect as a valued client or professional partner of Contemporary Financial Planning.

## What to expect from the Second Opinion Service

We will meet with your friends, family and clients for a discovery meeting and then invite them back for a wealth management plan meeting. Hopefully, we can confirm they're on track to meet their goals. If needed, we'll suggest ways in which we can help, including recommending someone else if we're not a good fit for their needs. **Either way, they'll receive both a Life Map and a personalized analysis of their current situation.**

## Second Opinion Service

**Step 1**  
**15 Minute**  
**Phone Call**

**Step 2**  
**Discovery**  
**Meeting**

**Step 3**  
**Our Second**  
**Opinion**

Contact us today to learn more about how we can help to improve your current situation



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