

THE PLANNING PROCESS

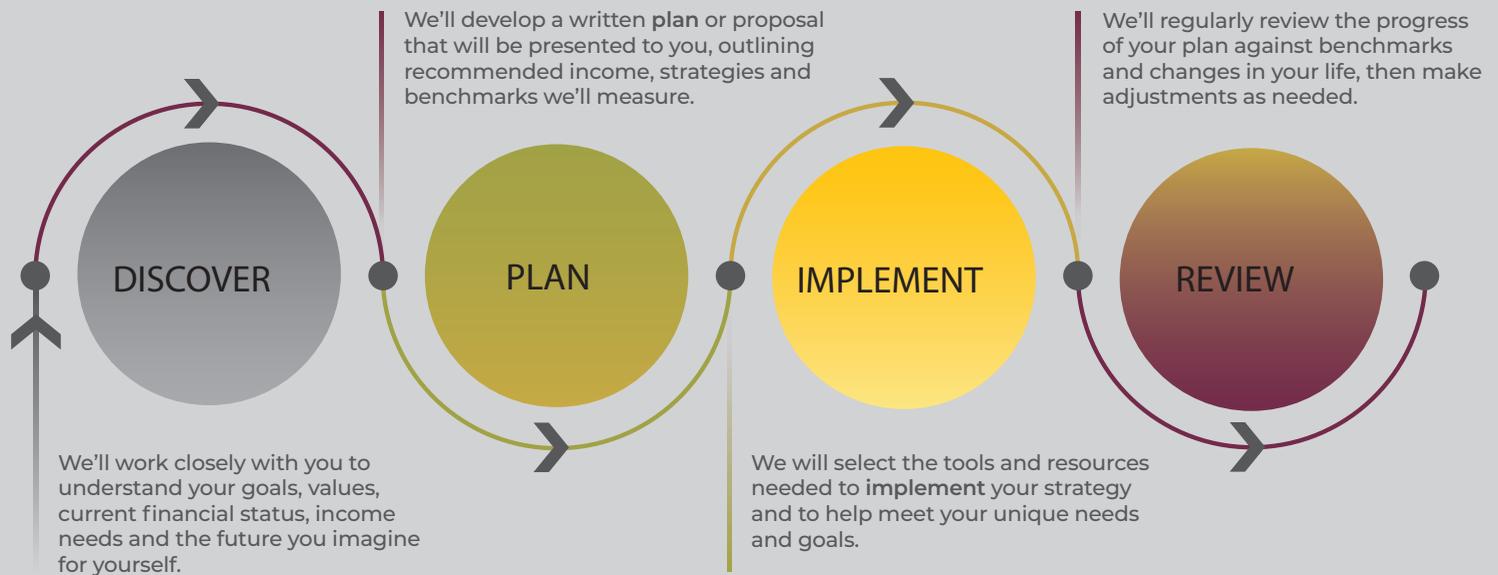
By starting with identifying your current position and your goals for the future, we evaluate options and recommend strategies to get you where you want to be.

We don't stop there. After implementation, we continually monitor your financial situation to ensure you remain on track to achieve your financial dreams.



DESIGN - BUILD - PROTECT

With tens of thousands of investments to select from – and more appearing everyday – investors face an overwhelming and endless series of choices. Our Asset Class Investing philosophy is a prudent approach designed to help you achieve the life you want. By focusing on your current investments and your most important goals rather than short-term market trends, we structure your portfolio with a disciplined approach that protects against common behavioral mistakes that can compromise your long-term financial goals.



Richard Artura, CFP®, CRPS®, CMFC®, LUTCF
Investment Advisor Representative
office: 206-674-4647 fax: 206-674-4650
email: rartura@rjafinancial.net
www.rjafinancial.net

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