



ARK
Financial Wellness™

OUR 3-STEP PLANNING PROCESS

STEP ONE: FREE FINANCIAL CLARITY COACHING SESSION

A 30–45 minute no-cost, no-obligation VIRTUAL MEETING to gain a clear picture of where you are, what you need, and how to get where you want to be in your financial wellness journey.

STEP TWO: THE FINANCIAL WELLNESS BLUEPRINT

A 60–75 minute financial organization and planning meeting to build a solid base that reflects your current situation and lays the groundwork for your goals.

STEP THREE: THE PURPOSEFUL PATHWAY

Ongoing meetings to maintain your personalized financial wellness journey – balancing today's enjoyment with tomorrow's security.

