

TRANSITIONS

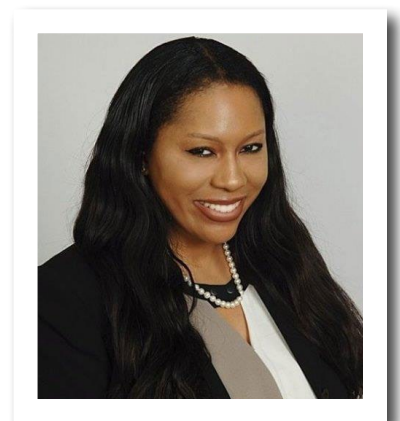
THE FINANCIAL ROAD MAP TO MANAGING WEALTH

Picture yourself living your retirement years comfortably or planning a dream vacation to a tropical oasis that you have always wanted to take. Imagine taking a long stroll on a picturesque beach, as you feel the warm, white sand between your toes, or as you hear the gentle waves of the aquamarine waters lapping the sands ever so languidly in front of you.

You may have been contemplating taking this dream vacation, starting a family, retiring, or leaving behind legacy wealth to your children and, or grandchildren. These may be just a few of the financial goals that may be important to you. Each of these goals may be attainable with a well thought out financial plan. We can help you target your goals holistically, then outline some strategies that are tailored to your individual needs, based on your available resources and time horizons. Essentially this is a financial road map to help you meet your goals.

You may be asking yourself the following questions, “What exactly is a comprehensive financial plan?” and “Why does it matter to me?” These are great questions. During our life, we are faced with making many complex financial decisions for the wellbeing of our family and ourselves, particularly around prioritizing our needs from wants. Our plan serves as a framework for organizing the pieces of your financial life. Our sophisticated approach may provide you with a clear picture of your entire financial life, which may help you to better envision each of your objectives so that you can understand what it will take to reach them.

One of the main benefits of our new formalized process is that it can help balance competing financial priorities. We will show you how your financial objectives are related to the investment decisions we make on your behalf. Best of all, you’ll know that your financial life is headed



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on the right path towards achieving some of your objectives. Part of our goal here is to work hard to make the process as easy as possible, and we will gladly answer your questions along the way. The process of creating and implementing a comprehensive financial plan will involve working with us to develop a clear picture of your current financial situation. This process includes reviewing your income, assets, liabilities, and your investment portfolio(s). The second step in the process is for us to establish and prioritize your financial aspirations within your time frame. Thirdly, we will work together to implement and choose investments that are tailored to help you meet your financial objectives. The financial planning process doesn't end once your initial plan has been created.

Together we will review your plan periodically to make sure that it's up to date as life circumstances change. Most importantly, a financial plan may provide you with the direction, discipline, and clarity that you need to accomplish some of your aspirations. A well thought out financial plan that we will customize for you will give you the ability to achieve your goals with clarity. Every plan that we create is not just a cookie-cutter strategy, but one that is designed and optimized for you. The goal of structuring a concise well defined financial plan is to help create a financial road map to manage wealth through all of life's transitions. Last, but not least, is the exciting part of seeing you reach your dreams.

See you on the beach!



Our plan serves as a framework for organizing the pieces of your financial life.

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commentary and
insights.**

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CREATIVE SOLUTIONS TO WEALTH MANAGEMENT

Diamant Asset Management was built on a foundation of family and friendships with ethics and integrity as our guiding principles. As an independent Registered Investment Advisor, we take our fiduciary responsibility seriously and act as a guardian of your wealth.

Managing wealth through the transitions of life. It's what inspires us to do what we do every day.