

**DELIVERY OPTIONS:**

- Confidential one-on-one in-person consultations are scheduled for 1 to 1½ hours depending upon the life event
- Confidential telephone consultations are scheduled for 1 to 1½ hours depending upon the life event

**THE COACH:**

- Gary Tagtmeier, CPA, Registered Investment Advisor, Real Estate Broker and founder of FAI

**MATERIALS  
NEEDED:**

- Each client receives a copy of our Making Ends Meet and Dreams Come True workbook (essential for helping employees complete a personal, private financial inventory).

**(D) Individual Coaching in Personal Money Management**

**THE PROBLEM:**

*Studies show that employee productivity is negatively affected by the problems caused by life events.*

Sooner or later, we all have to contend with major life events. These include events such as getting married, having children, getting divorced, buying or selling a home or car, using credit, marriage problems, and planning for retirement, just to name a few. When these things happen, most people would love to have access to good, objective (a key word!) financial advice and counseling. Unfortunately, most people simply don't know where to get it. Dealing with these events without *objective* professional guidance and direction can be very stressful and lead to drastic financial mistakes. And, we know that the stress resulting from personal financial concerns has a very serious affect on employee productivity.

**THE SOLUTION:**

*FAI's Personal Money Management Coaching Service (PMMCS) helps employees deal effectively with troubling life events.*

Our PMMCS is a thorough, personal and confidential service that helps employees create a realistic inventory of their financial assets, liabilities, income, expenses and financial goals, (something that most people have never done). The coach then analyses the information, assesses the individual's situation and helps to develop a realistic, attainable plan to deal with such events.

As a result of our individual coaching, most people will know exactly what needs to be done and will be able to deal effectively with their issue(s) on their own.

Some employees may yet need to be referred to legal, tax, or investment advisory professionals to help them deal with particular issues/problems. The professionals FAI refers people to are strictly fee-only advisors, not commissioned salespeople. This eliminates the obvious and often overlooked potential for serious conflicts of interest.

(10-1-07)