



Introducing Our 360° Second Opinion Service

...a message from Avalan

As you may know, Avalan represents a select group of clients, for whom we can provide a major beneficial impact. We enter into new relationships only via personal introductions from our existing clients and professional partners. We wanted to offer you a service that we provide to our best relationships for the people they care about most. In today's uncertain times, there has never been a bigger need to "check under the hood" to make sure

you are on the right path. People are very unsure of what to do now.

We now offer our second-opinion service to help the people we care about most to make informed decisions. We'll take you through the same consultative and collaborative discovery and analysis process we provide our best clients to help you get clear on where you are now and where you would like to go. We examine the gaps that need to be filled. At Avalan, we believe that knowledge is power and without knowing all we can about our current situations, we can never achieve all of the things that are most important to us.

Through this process, ONE OF THREE THINGS WILL HAPPEN:

- We find out that you are in good shape and advise you to stay where you are, or,
- We find out that you could better your situation. If we are not a fit for your particular situation, we are happy to point you back to your current advisor armed with new information, or to a financial advisor who can work with you more effectively, or,
- We find gaps in your current plan and feel we could provide a significant advantage in helping you reach your goals. We would then further explore the idea of working together with you.

ARE YOU READY TO TAKE HOLD OF YOUR WEALTH® AND MOVE CONFIDENTLY INTO LIVING THE LIFE THAT IS MOST IMPORTANT TO YOU?