

The Brightleaf Group Value Proposition

6. Behavioral Finance Insights and Coaching

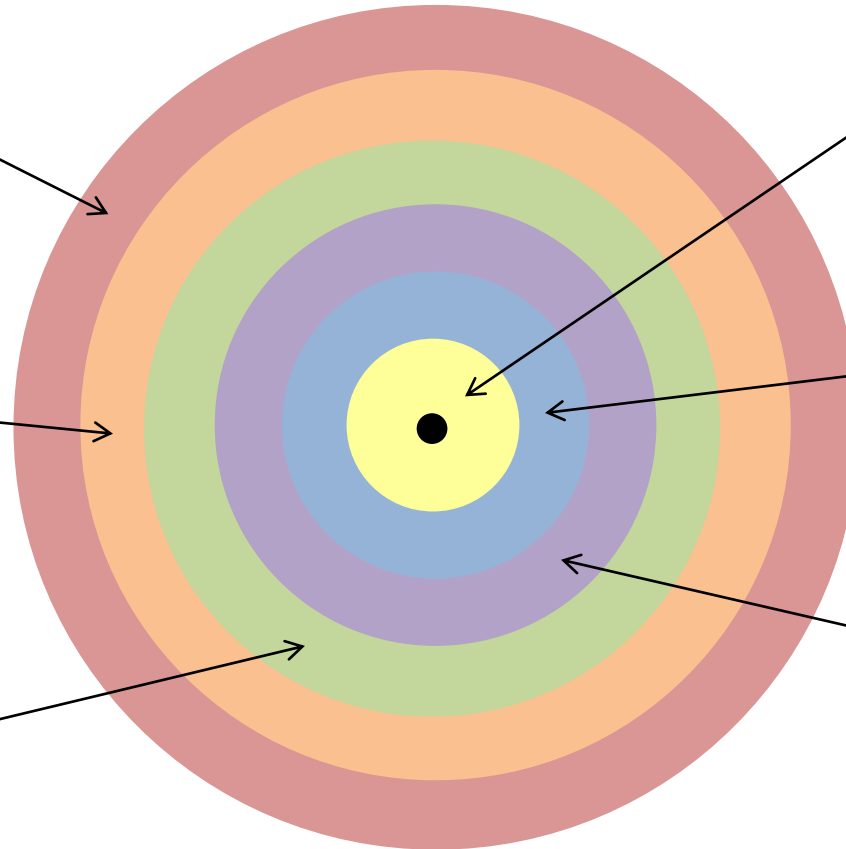
Acting as an objective sounding board.

5. Events, Transitions, Values, Goals

Handling the changes that occur along the journey.

4. Standard of Care

Handling the complexities that occur as you grow older/build wealth.



1. Individual Investments

Identifying specific ideas.

2. The Portfolio

Bringing your investments together in a strategy.

3. The Financial Plan

Answering the question, "Will I be ok?"

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