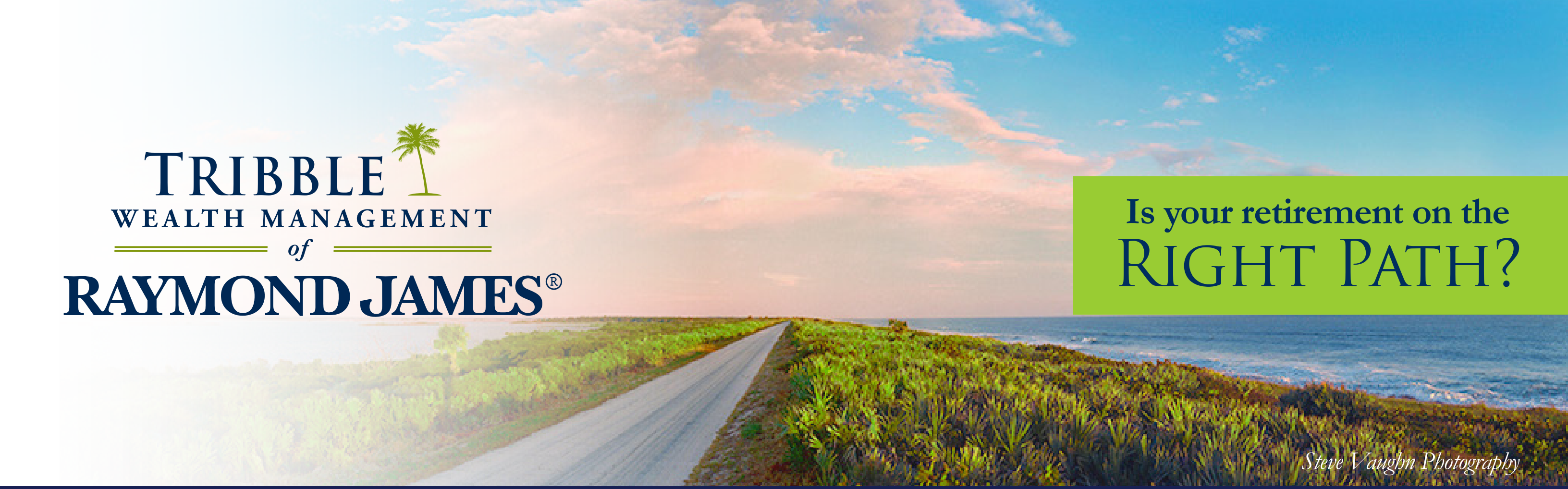

TRIBBLE
WEALTH MANAGEMENT
of
RAYMOND JAMES®

Is your retirement on the RIGHT PATH?

SECOND OPINION SERVICE

VOLATILE FINANCIAL MARKETS
RETIREMENT CHECKUP
FED RAISES INTEREST RATES

Is it time to take a fresh look at how these changes may affect your future? In these seasons of uncertainty, you might benefit from a second opinion. If you're feeling you need a new perspective, you are not alone. Research has shown that over 80% of investors would consider moving to a new advisor that offers a more comprehensive wealth management process.[1]

The Second-Opinion Service is designed to get a clear idea of where you are now and where you would like to be. You can go through all three steps – **without any expectation and without any cost or obligation to you.**

STEP 1
Get Acquainted

We begin with a conversation to get acquainted and clarify expectations of what you are looking for and what we do. We seek to learn where you are today, how you got to this point and what your goals and priorities are for the future. We discuss our philosophy and share our thoughts on what it is like working with a CERTIFIED FINANCIAL PLANNER™.

STEP 2
Discovery Meeting

In this meeting, we will discuss in detail who you are, where you are and where you want to be. We identify how we may help get you there. We will gather data for a planning exercise that's designed to give you a better perception of your own situation. We are certain that this session will be time well spent.

STEP 3
Checkup Results

During this meeting we will recap what we learned during the discovery meeting. Then we will present and discuss the results from the planning exercise to let you know if you are in good shape on your current path. At the end of the meeting, if you would like to consider becoming a client of Tribble Wealth Management, we will discuss the next step in our process.

We welcome anyone who is retired or within five years of retirement to consider this Second-Opinion Service. For more information, contact our office and take the first step by scheduling your first appointment.

CALL TODAY! 352.674.1682

[1] Source: CEG Worldwide

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