

THE APEX PROCESS



GOALS + PERSEVERANCE = HAN-EI
(MOST PROSPEROUS)

Review your progress regularly.

By transforming knowledge into wealth,
a prosperous relationship is born.

The result? Han-Ei.

6

THE ASCENT BEGINS

Work toward your dreams by implementing
recommended strategies.

5

THE COACH'S CORNER

Discuss how our investment and estate planning
strategies will help your dreams become reality.

4

THE TRAINING

Assess information and develop
recommendations to help
facilitate your dreams.

3

2

THE DREAM

What is important to you and why? How can we best serve you?

Gather your information, including existing account
statements, Will, insurance policies and names of other
advisors i.e. lawyer, accountant, family member/friend, with
whom to consult if necessary.

1

THE
CHALLENGE

With challenge comes the opportunity
for reward. Those who inspire, such
as a hero of mine, earn that reward by
knowing what is important and by
staying the course.

That same dedication is necessary to
build financial dreams. Our client service
agreement outlines our commitment to
you and our detailed approach to
achieving your financial success. In
return, we ask for open communication, a
willingness to learn and reasonable
financial disclosure.



Gordie Maikawa, BA CFP CLU CH.F.C.
Financial Advisor

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