



Expert services for every branch of your financial life.

## How is **Congruent** different?

Our goal is to serve the “whole client” by providing all the specialized services necessary to help the client and family achieve their life goals.

From fiscal coaching to goal setting to financial planning our goal is to improve every aspect of the client's financial life.

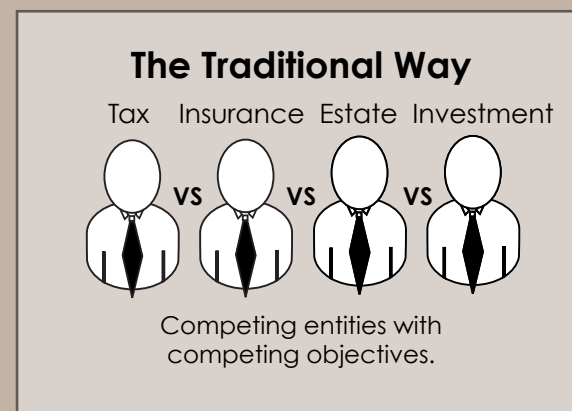
# OUR GOAL:

**Our team of experts collaborate as one for your long-term benefit.**

Through this team approach, we are able to build the most comprehensive picture of your finances available and as a result we are able to see where your current strategies are competing or flat-out failing you.

Unlike competing “single source” businesses our team works together to provide you a holistic strategy.

By getting the many separate branches of your financial life in sync, we are able to bring a **Congruent**, cohesive effort to achieve your life's goals.



Because life is better when all branches of your financial life are **Congruent**.

## Wholistic How?

Our **Wholistic Approach** mandates that we consider not only the numbers, but the underlying personal beliefs and spending habits that may be inhibiting you from reaching your life's goals.

Our fiscal and career coaching will counter these negative factors helping you to **get your personal goals and your life goals in congruence**.

- Financial Planning**
- Tax Law, Strategy, & Preparation**
- Fiscal Coaching**
- Business & Personal Accounting**
- Career Coaching**
- Retirement/Financial Planning**
- Estate Law & Planning**
- Insurance & Asset Protection**



## Congruent Strategies

Serving the “whole” client with our unique, collection of in-house, collaborative financial services.

We are changing the way people see their finances.

Call TODAY to see for yourself:  
**303-747-3860**

# Congruent For Business



## A Congruent workforce, is an efficient one.

Keep your employees happy and healthy with these professional business services:

- **Properly Protecting Employees**
  - Health
  - Disability
  - Life
- **Financial**
  - Accounting
  - Payroll
  - Tax Compliance
- **Retirement**
  - 401 (k)
  - Roth 401 (k)
  - Small Business
- **Education**
  - Get out and stay out of debt!
  - Career and Life Coaching

Learn what being **Congruent** in your financial life is all about, schedule a no-obligation presentation today: [www.BeCongruent.com/business](http://www.BeCongruent.com/business)

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