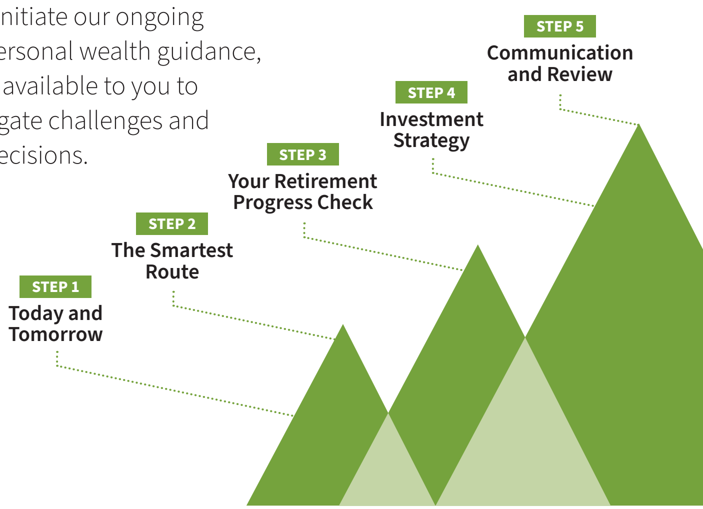
Blahnik
Investment Group Inc.

What to Expect:

Our Holistic Planning Process

We're thrilled to welcome you as a client of Blahnik Investment Group. This card should give you an idea of what you can expect next and where you stand with respect to our process of discovery, planning and wealth management.

These five steps initiate our ongoing relationship of personal wealth guidance, where we will be available to you to share ideas, navigate challenges and make financial decisions.



Step 1

Today and Tomorrow

The focus of our first meeting is understanding where you are today and where you want to be. Retirement is a central theme, but we work to uncover all the various facets of your financial life.

Step 2

The Smartest Route

Building your financial plan is about finding the smartest route to the goals we've identified. That is, with coordinated strategies and the least possible amount of risk.

Step 3

Your Retirement Progress Check

We complete your Retirement Progress Check by taking a deeper dive into the blind spots that could present unnecessary risks with respect to your investments and retirement income.

Step 4

Investment Strategy

By vetting portfolio managers and evaluating investment options, we compile recommendations we believe are best suited to your needs. This may also involve income planning strategies for those nearing retirement.

Step 5

Communication and Review

We meet at least once per year to review and update, and to complete a Retirement Progress Check. Our team frequently reaches out to share relevant information, and we are accessible and responsive to your calls and questions.

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