We are a neighborhood

financial planner.

We help individuals

and small businesses

plan for their futures.

Financial planning

is not just for the wealthy.

the Financial Plan

To learn more visit: www.lwplanning.com

We strive to give you confidence and peace of mind that you have prepared responsibly for your family's future.

We believe good financial planning can benefit everyone. We are a local firm that strives to be part of a thriving active community. We pledge to work with the commnity to provide financial planning to its members, through education, partnership and guidance.

We want to provide you with an education in the process of financial planning. We strive to help you work at the intersection of your life and your money to develop the right plan for your family. By working with our firm you will be actively involved in the financial process which promotes mutual understanding of retirement goals, financial risks and how to better benefit your family.

The goal of good planning is to bring peace of mind and understanding which we hope will lead to a happier more meaningful life.

Let's sit down and talk about your future!

Larry K. Weiss CFP ®, CPA
ph: (415) 794-4360
web: www.lwplanning.com
email: lweiss@nextfinancial.com
2030 Harrison St, 3rd FL
San Francisco, CA 94110

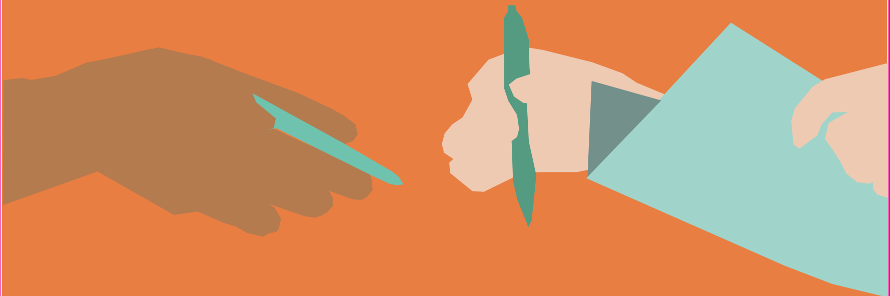
life the Financial Plan MONEY

Larry K. Weiss ph: (415) 794-4360

1

What is the Financial Planning Process?

Developing your financial plan is a multi-step process allowing you to look at your life, discuss the relevant facts and design steps that produce solutions which will benefit you and your family.



Step 1 : Setting personal goals

Together we will identify what you want from your finances and life.

Step 2 : Going over your relevant information

Laying out your financial information and goals.

Step 3 : Analyzing the information

Examining current holdings or property and debt in relation to your life goals.

Step 4 : Constructing a financial plan

Developing a personal roadmap including strategies to help achieve your goals.

What is the Financial Planning Process?

Step 5 : Implementing the strategies

Activate the financial plan and its strategies to take current resources to prepare to head towards future goals.

Step 6 : Monitor, implement and review

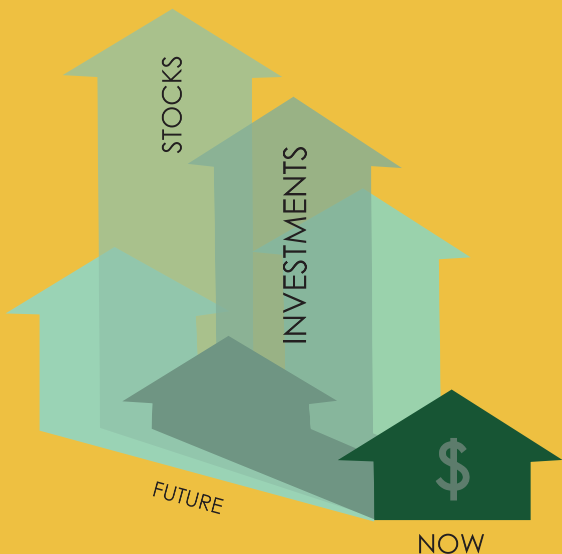
We help you monitor the implementation process to help ensure that it remains in line with your goals. Life's changing circumstances require periodic review of your strategies and goals in your financial plan.

life the Financial Plan MONEY

Larry K. Weiss ph: (415) 794-4360

What is Investment Planning?

A major element of the financial planning process is developing an investment plan that is right for you. This will require the implementation of strategies that can help you become more financially secure. "You want your savings and investments working as hard as you do."



To learn more visit: www.lwplanning.com

Investors must be able to identify their level of risk tolerance along with establishing when they will need their money.

Working with a financial planner can help you better balance your investments within financial asset classes. Planners can be instrumental in making the investment decision process rational. A clear understanding of the many different investment options can help you weigh your risk tolerance with projected returns to make the decision process informed rather than emotional.

In our practice, we will use mutual funds, exchange traded funds, stocks, bonds, REITS, outside money managers, alternative investments, and annuities to help provide you with funds when you need them.

What is Investment Planning?

In addition we will study your financial picture with a keen eye toward tax savings and risk management. We will discuss the option of insurance solutions to reduce risk. A well-defined honest financial plan will provide a more rational financial future for you and your family.

Contact us today.

life the Financial Plan MONEY

Larry K. Weiss ph: (415) 794-4360

What can I expect when I become a client?

We believe the financial planning process is best implemented by good teamwork. We want an ongoing interactive relationship with you. Part of that relationship is being a good listener and sounding board for your goals and desires.

When you become a financial planning client you will receive:

1. A detailed written analysis of your future roadmap.
2. Written clear concise steps of actions to undertake.
3. Quarterly or semi-annual meetings to review your current situation.
4. Monitoring the implementation of your plan.
5. Discussion of tax saving ideas annually.
6. Review the implementation of investment goals and investment management allocations.
7. Ongoing discussion of planning and risk management.

What can I expect when I become a client?

8. Guidance to your family members on how money and financial investments work.
9. The right solution for you and your family through our knowledge and relationships within the community.
10. Regular communication about financial planning topics.

We can make your life better. Let us sit down and talk about you and your future. We want to be part of your team!

Larry K. Weiss ph: (415) 794-4360