



GOOD LIFE
FINANCIAL ADVISORS

of NOVA

We help **simplify** the complexities
of your financial life.

WHO WE SERVE

Active and Retired Federal Employees
Individuals and Families
Business Owners

While every client is different, we notice some common characteristics in clients who we are uniquely qualified to serve. We have found that our clients receive the most value from us when they are in the middle of – or preparing for – a major life transition.

Take a look at some case studies that represent scenarios we encounter in our work. While fictitious, these case studies give a good idea of who we frequently serve.

Jack is a 72-year-old Navy retiree. He's married to Ana, a retired public school teacher. Being a government retiree is not the same as retiring from civil work. There are different considerations, and they needed to partner with someone that would help them make sense of the different components of retirement. Their Financial Advisor at Good Life didn't pitch them on anything. Instead, he showed a sincere desire to get to know them and to really understand what matters to them. In the next couple of meetings, they worked together to develop a strategy. Thanks to their advisor's personalized financial plan, Jack and Ana could transition into their retirement with confidence about their future.

Meet Jack



Meet Carl + Deb



Carl is a retired Army colonel who specialized in logistics. Deborah stayed home for a few years while their three kids were young. As the kids grew older, she rejoined the workforce. Deb and Carl's children left the house, and the commute was wearing on them both. They really wanted to retire, but at 57, they weren't sure at what age they could afford to. Their friends urged them to meet with our team to see if we could help. When their financial plan was delivered, they were presented with a detailed list of recommendations that they could take to make their early retirement dreams possible. There was no pressure, and they felt as if a huge weight had been lifted.

OUR PHILOSOPHY

We believe that financial planning comes down to three critical questions:

1. Will I make it?
2. What are my blind spots?
3. And what is my “it”? (That is, what is important to me?)

Answering these essential questions can be time-intensive and requires specialized training and resources. Let’s face it, sometimes busy people don’t have the time to give enough attention to their finances. We dedicate our time, training and tools to help you find answers to these core questions – and put you on a path to financial peace.

OUR VALUES



Integrity



Trust



Empowerment

Ability without integrity is nothing. At Good Life Financial Advisors of NOVA, we believe that integrity is the bedrock upon which everything else is built. Trust is something that is earned; it is not given. When you hire a financial advisor, you’re empowering someone to help you with one of the most personal aspects of your life – your money. We work hard every day to earn the trust that you have placed in us. We treat each client with this high standard of personal care, and we live our commitment to serve with integrity every day.

OUR PROCESS

What we do at Good Life Financial Advisors of NOVA may not be unique, but we do have a different approach. Our N.G.P.S.[™] process helps simplify financial planning - a topic that often seems complex.

N.G.P.S.[™]



Where are you **NOW**?

It is important to understand where you are at this very moment. We will help you establish the exact point you are at in your financial journey.



Developing **GOALS** is critical.

People are so busy working they don't always know what they're working towards. Our team will help you quantify and qualify the goals that matter most to you.



The fact is, we all have **PROBLEMS**.

The good news is many problems can be overcome with careful planning. We will work with you to understand the problems present in your financial life, even the ones you may be unaware of.



STRATEGIES become self-evident.

We will work through this process and show you independent strategies to help you pursue your goals and address your problems on your financial journey, no matter what that looks like.



OUR SERVICES

We know that the complexities of financial planning and investing can be overwhelming. With everyday demands pulling us in different directions, a clear path to retirement can become quite hazy. We work with you to simplify your path by offering customized financial plans that are tailored to your situation. We can help with retirement income planning, investment management, insurance needs, college savings, tax mitigation, estate planning, charitable giving, and more.



Financial Planning



Outcome-Driven Investing



Retirement Planning



Estate Planning



College Savings



Social Security



Lifetime Tax Planning



**Life Insurance,
Long-Term Care Insurance,
Disability Insurance**



**Charitable Giving
Strategies**

FINANCIAL PLANNING

Everyone has a dream of what they want their life to look like. Whether your dream is to retire and travel the world, save enough for your children's college tuition, pass your wealth on to future generations, or meaningfully support your favorite charities, our goal is to help you turn those dreams into realities.



A Holistic Perspective

Considering your entire financial future may feel overwhelming. What is your current and future tax situation? How much risk are you comfortable with? How do you balance short-term goals, such as buying a home, with long-term goals, such as retirement? We help you answer these questions and more.



Personalized Plans

No two financial plans are the same because no two people are the same. We understand that finances are personal. We take the time to get to know you and create your personalized plan that goes beyond just the dollars and cents.



Expecting the Unexpected

Life is full of unexpected twists and turns. Your priorities may shift as you grow older and hit new milestones, or events you hadn't anticipated may cause you to alter your plans. We'll be your partner throughout it all to help you focus on what matters while recommending wise changes when prudent.

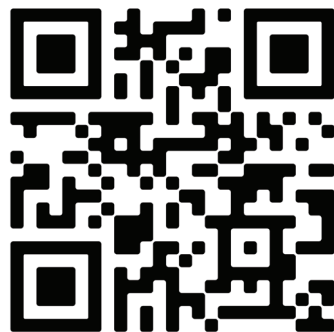






ARE WE A GOOD FIT?



At Good Life Financial Advisors of NOVA, we understand that it can be difficult to know where to begin, or who to trust to help you focus on the financial priorities you may have been putting off. We have been valued advisors to hundreds of people.

If you think we might be a good fit to help you, scan below to schedule a complimentary, no-pressure consultation:



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