



# TAKE THE RETURN ON LIFE ASSESSMENT

## MOVING FROM ROI TO ROL

Financial advisors historically focus on helping you get a greater return on your invested assets. We still do that. But more importantly, we help you use your money to get a greater Return on Life (ROL).

It starts with aligning our money with our values. In the Return on Life philosophy, the central question is not, "Do I have enough money?" That's a secondary question. The central question is, "Am I managing my money in a way that's improving my life?"

To begin the process of getting a better Return on Life, we start by assessing where you are today using a tool we call The ROL Index.

Once you complete the 20-question assessment, you can see your score, which is organized into three broad categories: Well-Being, Progress, and Freedom. The key to raising your ROL is to know that you are using your money in a manner that improves your wellbeing as well as your sense of progress and freedom. In other words, you are getting the best life for your money.

As your advisor, we look at all of the traditional areas of financial planning and investment management, including taxes, cash flow, estate planning, distribution planning, and risk management. We place all of those within the context of where you are today, where you've been, and where you want to go. And through it all, we keep your Return on Life at the center of the conversation.

[TAKE THE ROL INDEX ASSESSMENT](#)

## What is your Return on Life?



Well-being



Progress



Freedom

Learn how to live

**the best life possible**

with the money you have