

# Get a Second Opinion

## No Fee, No Stress, No Obligation



Is your current financial plan in alignment with your goals?



Are your investments performing as well as they potentially could be?



Do you know what you pay in fees, and do your fees justify the service you are receiving?



Is your advisor a fiduciary?

## If You're Not Sure

We'd be happy to provide a complimentary second opinion

### Step 1

#### Discover

The first step will be to understand the goals and objectives as well as any planning that has taken place up until this point. Part of this discussion will revolve around the amount of risk that we believe to be suitable according to your circumstances.

### Step 2

#### Review

Next, we will review the overall plan and discuss the potential for achieving financial goals according to your risk tolerance, existing allocation and cash flow needs. In addition, we will review the fees being paid and express our view on whether they are justified with the services that are being received.

### Step 3

#### Inform

If we believe your current plan is on track, we will let you know. If some minor adjustments should be made, we will offer that suggestion. At the end of this process you will have a complete review of your financial health.

## Get in Touch

21300 Victory Blvd. Suite 855  
Woodland Hills, CA 91367

Phone: 818-676-0036  
Fax: 818-676-0017  
Email: [joder@oderllc.com](mailto:joder@oderllc.com)