EsenCial CONSULTING
*Educate. Empower. Elevate.™*

WEBSITE OVERVIEW

# The EsenCial Financial Foundation™

**Four Weeks | One on One | One Personalized Financial Foundation**

PROGRAM OVERVIEW

## A clear path from understanding to action

The EsenCial Financial Foundation™ is a four-week, one-on-one coaching experience designed to help working professionals understand where they are today, clarify where they want to go, identify areas of their financial foundation that deserve attention, create a personalized roadmap, and begin taking informed action.

*No pressure. No confusing financial language. No sales presentation disguised as education. Just education, personalized guidance, a clear plan, and informed action.*

WHO IT IS FOR

## Working professionals ready for greater financial clarity

Designed for working professionals - especially healthcare and young professionals - who want clear, trusted guidance as they consider financial protection, saving, retirement, investment strategies or concepts, wealth building, and legacy.

THE SIGNATURE METHOD

## The four week journey

| Week | Focus | What you gain |
|---|---|---|
| **1 DISCOVER** | Understand where you are. | Clarity about where you are and what you want to accomplish. |
| **2 LEARN** | Understand how money really works. | Stronger understanding of the concepts behind your decisions. |
| **3 BUILD** | Turn learning into a personalized roadmap. | A plan organized around your priorities. |
| **4 ACT** | Begin putting the plan into motion. | A clear next step and the confidence to begin. |

WHAT IS INCLUDED

# Personalized education and a practical roadmap

- Four private coaching sessions
- A personalized Financial Foundation Blueprint
- Educational resources and worksheets
- A practical action plan with clear next steps
- Access to future EsenCial educational workshops

THE INTENDED OUTCOME

## Clarity confidence and a practical next step

The goal is for you to understand the areas of your financial foundation that deserve attention, have a personalized plan, and know your next informed step.

**“I understand. I have a plan. And I have started.”**

HOW EsenCial WORKS

## Education before recommendation

Education comes before recommendation. You ask questions, evaluate your options, and decide what aligns with your values and circumstances. Any implementation remains individualized to your goals, eligibility, and decisions.

YOUR NEXT STEP

## Schedule a conversation

A conversation is the first step in deciding whether The EsenCial Financial Foundation™ is the right fit for you.

**We listen. We clarify. You decide.**

**hello@esencialadvisory.com**

**esencialadvisory.com**

EDUCATIONAL NOTICE

The EsenCial Financial Foundation™ provides financial education and personalized guidance. Educational content is not legal, tax, or individualized investment advice.