



The Builder's Rule™

“Measure Twice, Cut Once™”

The Builder's Rule™ is a “Your Financial House™” publication produced by fiSMART™
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Your Financial House: Finding Your Builder of Wealth

Greg Powell considers himself a builder. Never mind that he doesn't own a hard hat. He also doesn't even know a portico from a pediment. But for 23 years Powell has helped families build houses that provide more than shelter. He's dedicated to building dream houses. He's dedicated to building houses, lasting a lifetime.

Powell explains that he's not building with brick or two-by-fours. Instead, he helps families construct their financial houses. Those houses include every room they need, from early career through end-of-life concerns. His exciting and easy-to-understand approach to financial planning helps investors prepare for their futures.

As a senior wealth advisor, Powell spent most of his career developing his financial management philosophy with a national investment service firm. His work placed him in *Research Magazine's* 2002 Advisor Hall of Fame. His financial planning team won first ranking nationally for five years.

Then he decided to start his own company. Fi-Plan Partners puts his wealth management expertise to use with a program called Your Financial House. Powell is its builder. Powell explains to each client that most people do not build a house without a blueprint. The blueprint is a plan clarifying what the owner wants and how the builder will accomplish their vision.

A quality builder considers the family's needs and dreams first. He asks probing questions, to learn about lifestyles and priorities. He

works to assess feasibility, exploring specifications and building costs.

And that's what Powell does, too. He simplifies the process, asking questions about an investor's intended legacy, dreams, and lifestyle. He uses the rooms of a house as a tangible model, helping clients furnish each room, from the children's room to the estate planning room.

Powell explains the services of a builder (investment specialist), subcontractors (such as portfolio managers) and even guests (such as trust experts). Post-construction, he constantly updates the house plan to make sure it is solid, making suggestions for renovations whenever necessary, as when tax laws change.

Why has Powell's Financial House philosophy been so successful? Because it serves both the thoughtful financial advisor and the client. The Financial House concept simplifies wealth management for the client. He knows the rooms of his house. No longer anxious, he doesn't jump from one investment to another or one advisor to another. He is confident the structure is built sturdily, to withstand life's storms.



Your Financial House is the beginning of a long-term trust relationship between client and the wealth builder. The client can rest easy, knowing that the wealth builder is committed to keeping their financial house in excellent condition, updated to fit changing times and changing needs.

Now Powell is offering Your Financial House to other “builders.” Entire planned “communities” of financial houses are under development across the nation.

And it's all from one wealth builder – who doesn't know his siding from his soffit.

Greg Powell,
Creator of Your
Financial House

