

FREQUENTLY ASKED QUESTIONS

Below you will find a list of "Frequently Asked Questions" that will help you to better understand what we do, and how we can help you achieve and maintain life and financial success:

WHAT IS LIFE PLANNING?

We define life planning as the process of:

- Expressing your values.
- Imagining your vision as a series of steps.
- Deciding the goals you want to achieve.
- Determining where you now are in relation to them.
- Planning how to bridge the gaps.
- Implementing your plan.

DO YOU ALSO DO FINANCIAL PLANNING?

Yes. Financial Planning is a major part of Life Planning. Traditionally, it has been practiced as a way to simply sell you investments or insurance. We incorporate it into your and your family's whole life planning. We also help you implement your planning.

HOW DO YOU GET PAID?

We are usually paid on a fee-only basis. For insurance, you may choose a commissioned approach.

We will need to agree on the method and timing of payment and level of fees, if applicable, before proceeding.

WHAT INFORMATION DO YOU NEED FROM ME?

Documents to Bring

HOW DO I CONTACT YOU?

info@millerfp.net

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