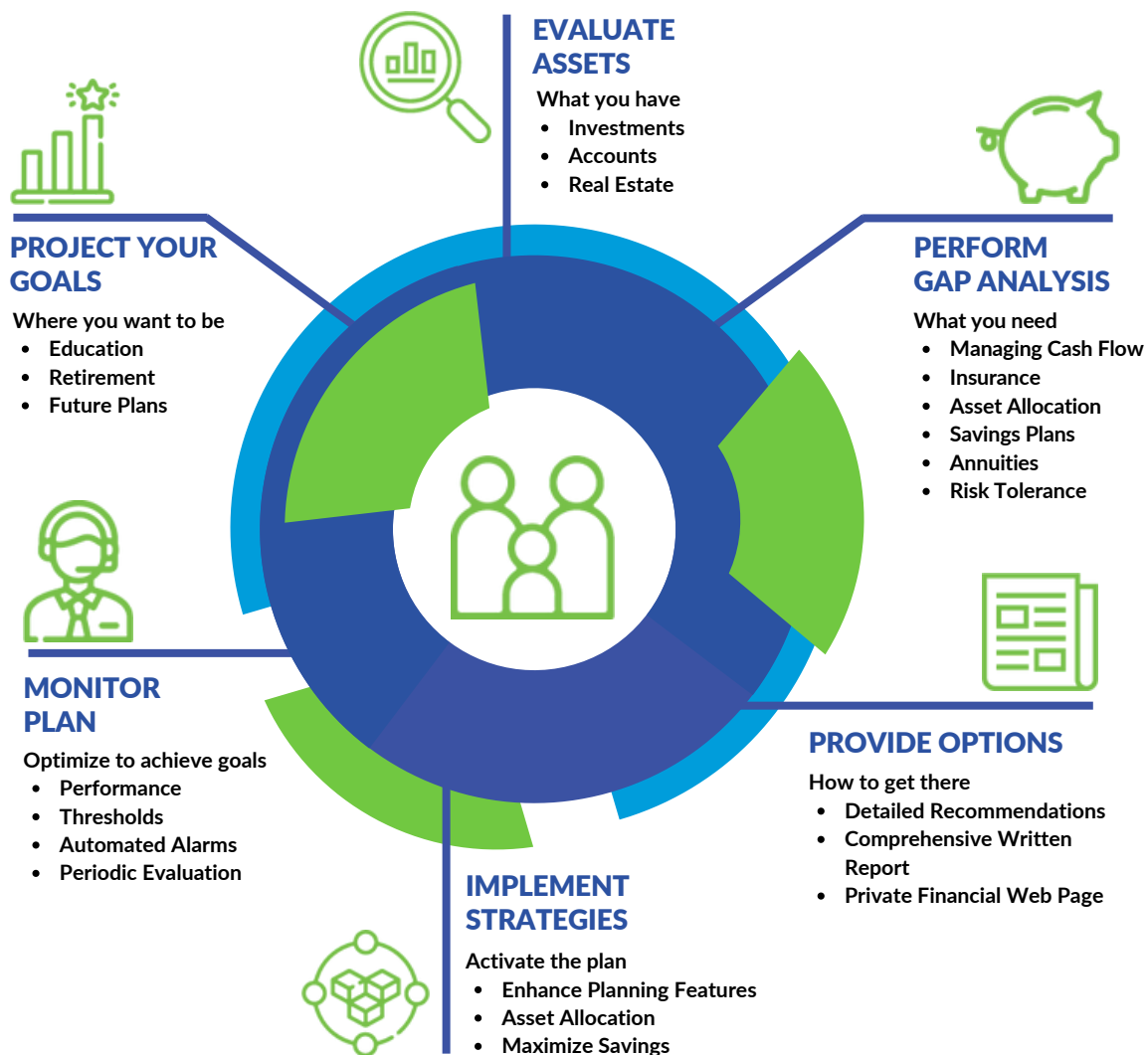


# Foundational Planning

Ready to take your financial journey a step further? You have access to SMARTMap® Foundational Planning, a benefit that gives you access to an advanced financial advocate team, financial planning technology, and robust goals-based reporting.

**Your goals are the cornerstone of the planning process.**



Chat or Email Us:  
[smartmap.worldadvisors.com](https://smartmap.worldadvisors.com)  
[smartmap@worldadvisors.com](mailto:smartmap@worldadvisors.com)



Call Us:  
 (888) 736-4015  
 M-F 8:30AM-8:00 PM EST



Schedule a Call:  
 Scan QR code or visit  
[smartmap.worldadvisors.com/contact-us](https://smartmap.worldadvisors.com/contact-us)

# Foundational Planning

**Start Your Journey.  
Plan for Your Future.**

## Getting Started

Schedule a call with our team and get matched with a dedicated Financial Advocate who can answer questions about a variety of financial topics, including:



Retirement Planning



Debt Management



Investing Outside Retirement Plan



Budgeting & Spending



Insurance Needs



Big Purchase Planning

When you schedule a Foundational Planning Call, your Financial Advocate can provide you with an **in-depth and personalized look at your financial picture by analyzing your account data** from your portal.

## Build Your Foundation

We'll work side-by-side with you to help you understand the financial impact your decisions have on your plan, and we can simulate multiple scenarios in real-time to model the different options you have.

**Your Foundational Planning Journey doesn't end after you hang up the phone!**

You can request your Financial Advocate to check in with you at increments that make sense for your goals to help ensure you are still on track.



After your call, all of the reports we generated will be accessible to you through your **personal, secure vault that you can access at any time**. Ready to schedule a call? Scan the QR code below!



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