



Karen Sharon Chartrand

Business Presentation



Sharon Chartrand Business Presentation

1. Sharon Chartrand Business Presentation KC & Associate Financial Services.
Insurance and Investments.

2. Today launches a new beginning, I am seeing communities companies and businesses all coming together to create a better tomorrow! I know WE are having a huge impact in our communities and it shows how caring WE are! Impact Client, through Product and knowledge.

3. Average invest Household Age age 45 and under: 3.2 times more invested age 45-54:
2.7 times more invested age 55-64: 5.3 times more invested age 65-over: 4.1 times more invested based on 2009 stats. The Value of Advisor

4. Customer experience made easy! As a Financial Educator, I'm here to help you with your financial planning through Dream map strategies and techniques.



Through Dream map my clients will receive help with building their portfolio so they can achieve their dreams. My Goal is to help families.

5. Goals Energy Stages Personal financial review, • I know what I want • Chief Aim • Goal • Dreams My Personal Strategies: Dream Map (what do you want)!

6. In today's economy everyone can use a financial background. Why, to know how money impacts their life for today and tomorrow! From young to old. For today's world and the impact of tomorrow world. My Clients are anyone and everyone.

7. Do you know the rules and regulations of today's economy To save on Taxes and know strategies to increase your cash flow. Threw product awareness, I can teach you if your coachable and committed to sticking with a Plan. Your Commitments may change but a plan of action is your Goal. My Game plan is to Educate You!



8. Areas we cover, WHO ARE YOU! • STATE: HOW YOU SHOW UP • ACTION: WHAT YOU DO • INTENTION: WHERE IT ALL BEGINS Why Me, I will look at Your Energetic Factors for Your success.

9. • Insurance Planning • Cash Flow Planning • Emergency Funds Planning • Estate Planning • Tax Planning • Retirement Planning • Investment Planning Disciplines of Financial Planning

10. Then we go threw Your • Tasks • Keystone Goal • Chief Aims • Dreams Then we determine your next possible action step. I am Unique

11. For more information, please contact me. Can you afford Not to find out more \$
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