

THE PORTAGE PROGRAM™

“Enjoy the Journey”



DISCOVER

1

Determine Fit
Share Values & Goals
Review Situation

MAP

2

Set Priorities
Choose Direction
Create Your Plan

NAVIGATE

3

Implement Your Plan
Review Progress
Revisit & Adjust

STREAMS OF ADVICE

Asset Management • Retirement Planning • Risk Management
Estate Planning • Financial Management • Tax Planning



EBY FINANCIAL GROUP_{INC.}

Listen. Understand. Plan.