

Feel Confident in Your Financial Wellness

Discover a (fun!) user-driven financial planning tool unlike any other.



What is MyBlocks?

Financial planning shouldn't be intimidating. MyBlocks is an online financial planning tool that makes planning for your financial future easy and fun. By breaking up key topics into easy-to-understand "blocks" (including retirement planning, protecting your family, and more), you will increase your financial literacy as you define a financial plan for your future.

Your finances, your way.

Truly a self-service tool, MyBlocks allows you to complete interactive modules on your own time, at your own pace.

Who uses MyBlocks?



Young couples, planning for the future



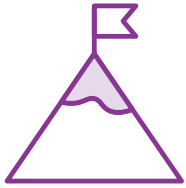
Established professionals, maximizing their wealth



Soon-to-be retirees, solidifying future plans

Regardless of where you are in your financial journey, MyBlocks has the tools that are easy, useful, and relevant to your personal goals.

Use MyBlocks to:



**Set financial
goals**



**Plan for
retirement**



**Pass wealth to future
generations**



**Maximize Social
Security benefits**



**Better understand
insurance options**



**Protect your various
income streams**

Try MyBlocks for yourself

Ask your advisor, Jim Lorenzen, CFP®, AIF®, for access to MyBlocks today!



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