

SOUNDING BOARD PROCESS

THE
INSIGHT
FORMULA

As a part of our process, and as a service to our clients, we make ourselves available to act as a sounding board to friends and family members. If there are people in your life that are important to you, know that they are important to us. If they are feeling apprehensive about the future, we are happy to sit down and share our process with them to help them feel confident about the future.



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Advisory services offered through Cottonwood Capital Advisors, LLC, doing business as Cottonwood Wealth Strategies, LLC.

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