

Your Financial Engineering Coach

The Financial Engineering Institute, LLC

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THE FINANCIAL ENGINEERING PROGRAM



*Life is not a spectator sport.
Clarify, amplify and launch your
dreams with controlled vitality.*



Engineering Dreams Into Life
FINANCIAL ENGINEERING

Empower — Enlighten — Transition

Enjoying success by living life to the max through your ageless passion for life can create time constraints.

Multi-tasking on the move between your family and career while preparing for life's transitions can take precious time away from dealing effectively with your financial affairs and your dreams.

Obtaining the objectively competent advice required in coping with today's complex financial world can be extremely difficult.

This exclusive concierge services Program was designed with these issues in mind. It comprises an elite team of professionals located across the country.

Our **Coaches** focus on improving your *financial CORE strength™* to achieve your dreams. They engineer your *financial life support system™* in coordination with the surrounding financial, legal and economic environment.



Using uncommon sense to enhance your *financial CORE strength™*

- ◆ Clarify your financial objectives and dreams.
- ◆ Organize your financial affairs to achieve.
- ◆ Reduce your risks of financial loss to protect.
- ◆ Enhance financial performance to prevail.



FINANCIAL ENGINEERING

- ◆ **Coaches** drive your dreams by developing financial strategies that provide the flexibility and balance necessary in adjusting to today's constant change.
- ◆ **Coaches** use their experience, creativity and cutting-edge knowledge to provide tax and legal planning tactics often overlooked.

FINANCIAL PRODUCT SELECTION

Properly designed insurance and investment products are integrated into your overall financial plan.

THE RESULT — YOUR DREAMS GAME PLAN

OpenOption dream architecture™ interfaced with properly designed products and services . . . monitored and refined as needed.

FINANCIAL ENGINEERING COACHES™
AN ELITE NATIONAL TEAM OF PROFESSIONALS
Pursuing Peak Financial Performance

THE FINANCIAL ENGINEERING PLATFORM
OpenOption Dream Architecture™



Learn more at thefei.com

Raise your game

Take a fresh perspective

Use our time-tested, leading edge approach

THE ZEAL OF OUR COACHES — A CUT ABOVE

Each **Coach** takes a *forward motion* perspective in providing a robust array of financial services and product solutions. These qualifications reflect our passion and dedication:

- ◆ They maintain at least one of the following professional designations: *ChFE, *CLU®, *ChFC®, CFA, CFP®, CPA, PFS, JD, AEP, CEP, CIC
- ◆ They have a minimum of ten years of dynamic financial engineering experience.
- ◆ They adhere to the Financial Engineering Institute's code of ethics.
- ◆ They complete a minimum of twenty hours of innovatively powerful continuing education each year.

INDEPENDENT — EXPERIENCED — COMPETENT — DEDICATED