HARVEST
FINANCIAL ADVISORS

MONEYGUIDE ELITE

Interactive Retirement Planning: Start Visualizing Your Future

Are you on track to achieve your retirement goals? Planning can make the difference, and it doesn't have to be difficult. See how Harvest Financial Advisors uses MoneyGuide Elite to give you peace of mind and control over your future.

RETIREMENT PLANNING

How is MoneyGuide Elite used in financial planning?

At Harvest Financial Advisors, we use MoneyGuide Elite, an industry-leading, digital financial planning program designed to build, track, and visualize your complete financial life. MoneyGuide translates complex variables like inflation, tax strategies, Social Security timing, and market volatility into a clear direction focused squarely on what matters most to you.

THE HARVEST DIFFERENCE

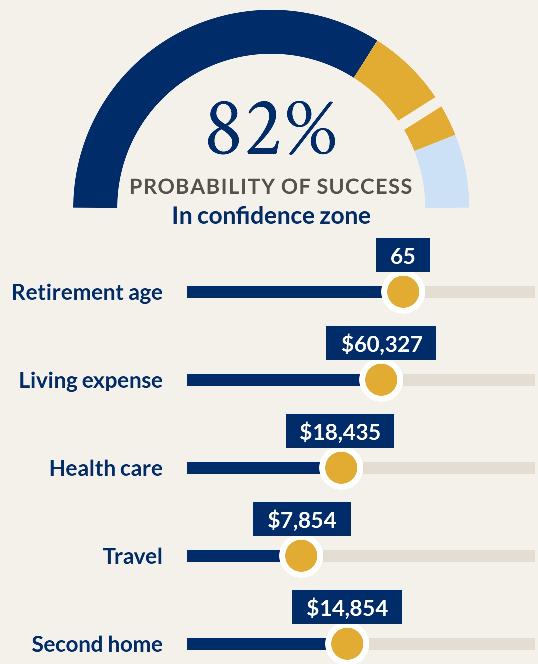
A Living, Dynamic Retirement Plan

Because Harvest integrates MoneyGuide Elite directly with your active wealth portal, your plan connects to real market data and updates daily.

You gain 24/7 access to an accurate, real-time picture of your financial standing, giving you certainty about where you are and where you are headed.

A great financial plan is never done. As part of our commitment, Harvest conducts comprehensive plan reviews every year, or whenever a major life change occurs. In doing so, we can address concerns and goals so you feel confident about your financial future.

YOUR MONEYGUIDE SNAPSHOT



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Three Ways Interactive Planning Benefits You

1 It Helps You Focus on Success, Not Daily Market Changes

In retirement, chasing high-growth market performance takes a backseat to protecting assets and reducing risk. We'll help shift your focus away from daily market fluctuations and back to your overall probability of success.

2 It Adapts to Changes in Your Life

As life changes your financial strategy should adapt with it. During live sessions with your Harvest advisor, we conduct what-if modeling in real time. Together, we can test options like:

WHAT-IF SCENARIOS

- *What if I decide to retire two years earlier?*
- *How does adjusting my Social Security start date impact my lifetime income?*
- *Can my portfolio support a major lifestyle change, second home, or travel goal?*

3 It Helps You Meet Various Needs in Retirement

We help you organize your life goals into three distinct categories:

NEEDS MUST HAVE

Essentials like living expenses and healthcare coverage.

WANTS LIKE TO HAVE

Lifestyle priorities like travel, hobbies, and home upgrades.

WISHES WISH TO HAVE

Aspirational goals like legacy gifting and bucket-list items.

This structured approach ensures your essential retirement is protected before allocating capital toward optional goals.

A FIDUCIARY RELATIONSHIP BUILT FOR LIFE

Financial planning is about more than assets and net worth. It's about what you want your money to do, and knowing you are fully prepared for the road ahead.

Experience how an interactive retirement planning session can bring new perspective to your financial future.

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