The Abundant Lifestyle Approach™

Glenn Ullmann and Deanna Brown are co-creators of The Abundant Lifestyle Approach™, a unique financial planning program designed to increase financial independence, personal growth, and to achieve the life of one's dreams.

Glenn Ullmann is the founder and president of Ullmann Financial, an independent registered investment advisory firm located in Ponte Vedra Beach, Florida. Glenn is an accomplished financial strategist with over two decades of experience with asset management, financial planning, client education and life coaching. He is a highly acclaimed speaker, community leader and is the author of *Landing a Smooth Retirement-The Only Financial Planning Book You'll Ever Need.*

Deanna Brown, CFP®, is Vice President of Financial Planning and a CERTIFIED FINANCIAL PLANNER™ professional. Through distinguished service with prominent Fortune 100 financial advisory firms, Deanna gained expertise in both wealth and asset management strategies. As co-owner of Ullmann Financial, she has created the structure and platform to enable clients to achieve their life goals. Deanna is a member of the Estate Planning Council of Northeast Florida and also a board member for the Financial Planning Association® of Northeast Florida, dedicated to promoting the growth and value of the financial planning profession. Deanna lives in Jacksonville with her husband, William, and enjoys volunteering for the Jacksonville Humane Society and First Coast No More Homeless Pet

Ullmann Financial Group

At Ullmann Financial we harness powerful resources and an integrated perspective to offer wealth advisory services for every dimension of our clients' lives.

Our combined experience, talented team of professionals and staff, coupled with a proven approach to financial planning create a dynamic of support, leadership and advice that is respected throughout our community and the financial industry.

Ullmann Financial
A PLAN FOR LIFE

5000 Sawgrass Village Circle, Suite 25
Ponte Vedra Beach, Florida 32082

904.280.3700
888.668.0739

www.ullmannfinancial.com

The Abundant Lifestyle Approach™

focus
plan
progress

The Abundant Lifestyle Approach™

The Abundant Lifestyle Approach™ is a revolutionary wealth advisory program designed to help individuals and families live more abundant, financially confident lives. Our unique approach integrates every dimension of our clients' personal and financial aspirations to create Abundant Life Plans™. These individualized, personal empowerment programs offer financial independence for you and your loved ones, personal growth, and the guidance to achieve the life of your dreams.

Step 1

The Focal Point Interview™

The first step of our process is designed to help uncover your personal and financial goals, concerns, and the resources you possess to achieve your dreams. This session is conducted with your dedicated Ullmann Financial advisory team and will include a thorough explanation of our process, services and fees.

Step 2

The Abundant Life Planner™

Incorporating information from Step One, and drawing upon our own network of Ullmann Financial Certified™ Resources, we present your Abundant Life Plan™. This comprehensive financial and life empowerment program encompasses many priorities including: family, retirement, education, estate planning, wellness and social responsibility.

Step 3

The Life Plan Engagement™

Implementation of your Abundant Life Plan™ begins with a review of the capabilities and services involved, the outline of specific action steps and the processing of any required paperwork. This meeting affords an additional opportunity to connect with your wealth advisory team to ensure that you are confident, comfortable and secure in the process.

Step 4

The Transformation Checklist™

Once you receive your first financial statements, it is likely you'll have questions. Step Four is a one-on-one coaching meeting to review your statements and to provide insight and explanation about each element involved. We will address all questions, provide recommendations for all action steps and provide you with specific guidance for the next phases of your plan.

Step 5

The Financial Progress Report™

We will meet periodically to celebrate progress and evaluate the elements of your plan. Using our Financial Progress Report™, we will measure specific goals, milestones and key metrics against current data.
By continually monitoring your plan's performance, together we can make steady growth towards achieving your abundant lifestyle.