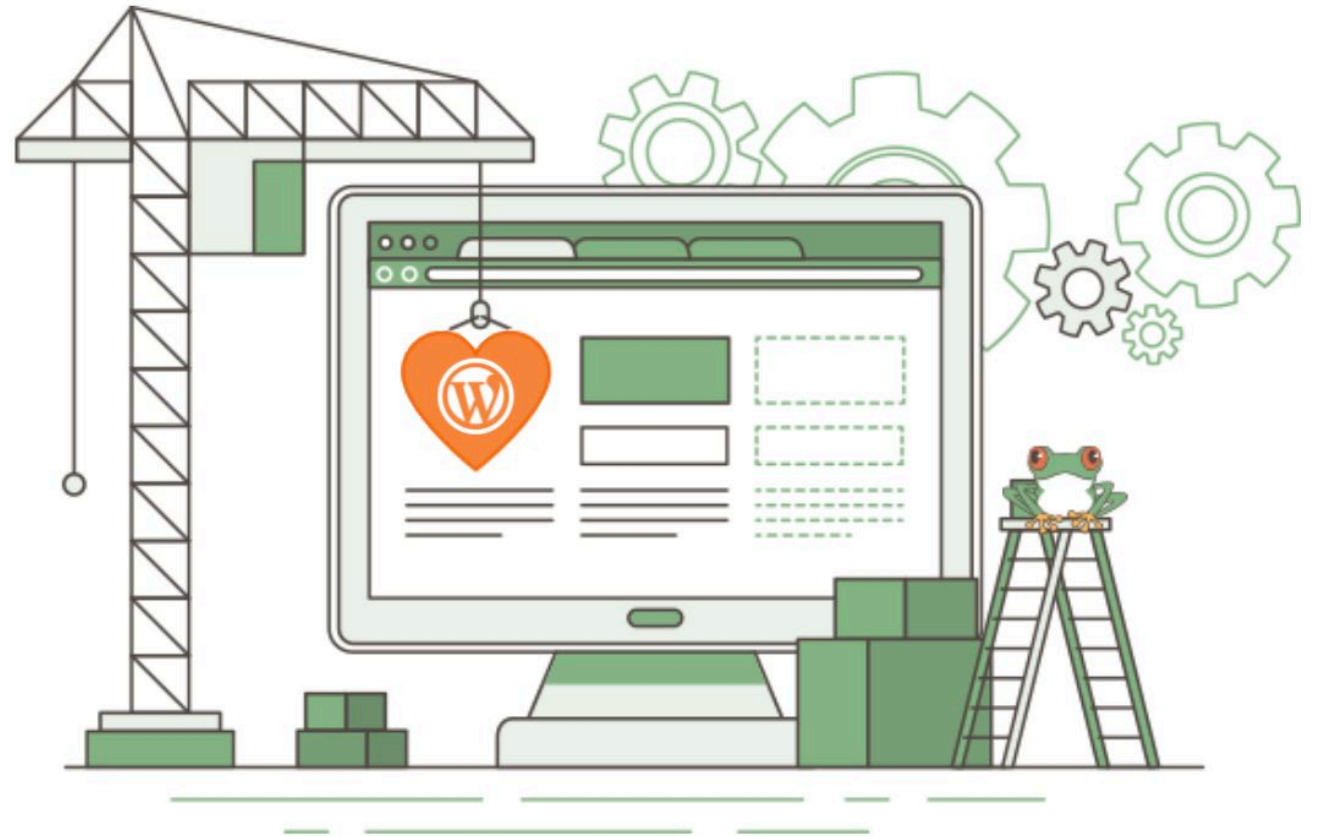


WEBSITES

That Work





Jessica Kohley
Marketing Director



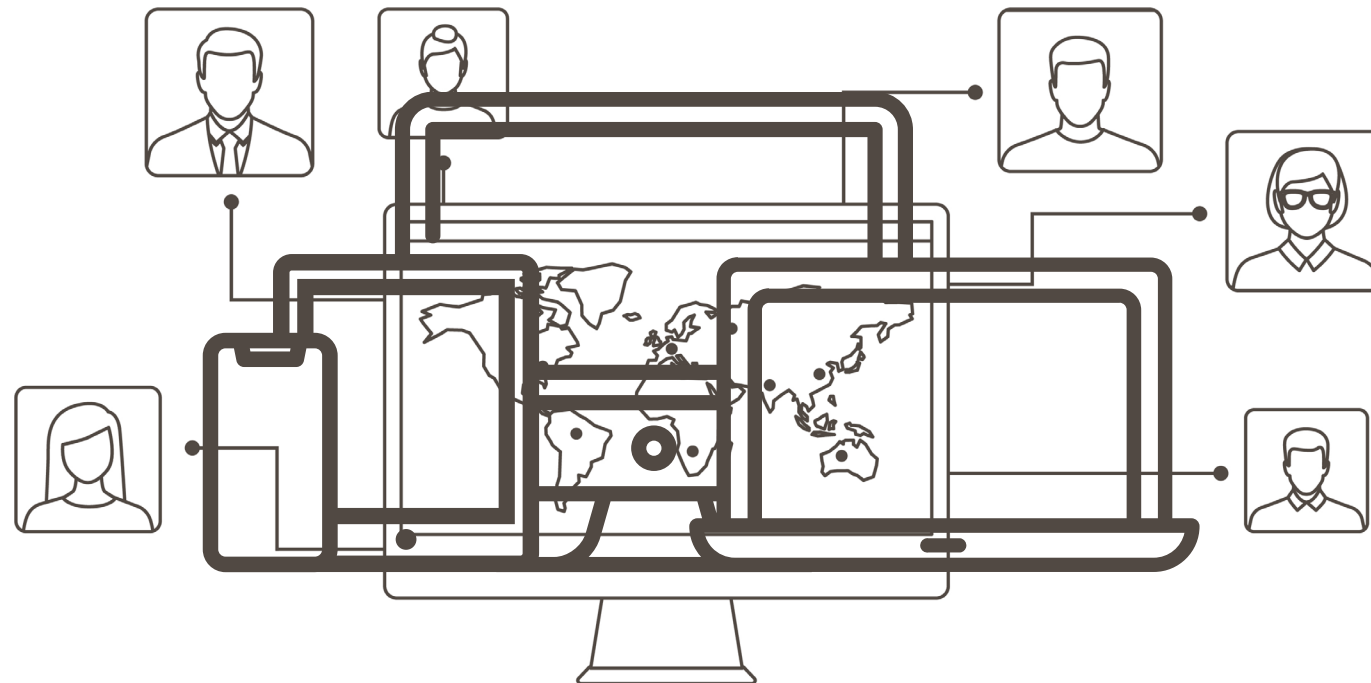
Chelsea Barrett
Project Manager



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The Digital Transformation

Your Website & User Experience (UX)



User Experience (UX)



Understanding Your Web Visitors



76

%

76% of customers
expect companies to
understand
their needs & expectations

Source: Salesforce Research 2018



salesforce



VISITOR PROFILE 1

Getting ready to retire

WHAT ARE THE EVENTS LEADING UP TO THE VISIT?

- Referral from an existing client
- Recognition that they are getting ready to enter the next stage in life and they need a plan for that stage

WHAT ARE THEIR PAIN POINTS?

- Overwhelmed: Now what sort of feeling
- Lack of understanding: Basic individual doesn't know how to properly live and balance this next stage of life
- Fear: Will they be able to financially handle everything?

WHAT ARE THEIR GOALS?

- Get organized and make a plan
- Find a firm to help them stay on the path throughout this next phase of their lives so they



VISITOR PROFILE 2

In Transition

WHAT ARE THE EVENTS LEADING UP TO THE VISIT?

- Referral from an existing client
- Recent life event and now have money (relative passed away, divorced)

WHAT ARE THEIR PAIN POINTS?

- Fear of the unknown: Transitioned into having some money and don't know what to do next
- Confused: So many options.. Which one is right?
- Scared: Will I make the right decision? Who do I trust?

WHAT ARE THEIR GOALS?

- Find a firm they can trust who can help them with their recent life event
- Someone who understands their situation

WHAT ARE THEIR KEY QUESTIONS?

- What makes our company different than other planners?
- Can I trust this company?
- What is the difference between investments and financial planning?

Build Trust & Credibility



- Industry Awards & Affiliations
- Social Trust (Case Studies, Clients Served)
- Visual Trust
- Longevity




Retirement Planning For Individuals Over Age 50

REDUCE TAXES · INVEST SMARTER · OPTIMIZE INCOME

GET YOUR FREE ASSESSMENT →

AWARDS & ACCOLADES





Get organized. Make a plan.
Enjoy your life.

A PROVEN PROCESS TO OPTIMIZE YOUR FINANCIAL FUTURE

[Get Started](#)

Your trusted financial advisor for comprehensive planning

Serving you face-to-face in Spokane, WA or virtually across the United States

It's one thing to have a written plan identifying the steps to reach your goals. It's quite another to follow through. At Quantum, we believe reaching your goals will require making adjustments as the plan unfolds.

That's how and why we've seen success for our clients time and time again.

Serving clients since

1979

Assets Under Management*

\$386,509,335

Average Client Tenure*

12.82 years

*All stats are as of 9/30/2020

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WORDPRESS







Web Design - Development - Secured Hosting

Toad-ally Awesome Websites That Convert Web Visitors to Leads Since 2003

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SERVICES

We Fully Kermit to the Client Experience


 WEBSITE DESIGN & DEVELOPMENT Conversion-Based Approach	 TINYFROG'S PROPOSAL BILDR Proposal Management System	 SECURED HOSTING & MAINTENANCE 24/7 Security and Protection
 WOOCOMMERCE E-COMMERCE Sell One Product Or Hundreds	 WORDPRESS FIXES & TWEAKS From Repair to Performance	 SEARCH MARKETING & OPTIMIZATION Maximize Your Web Presence

Top-Rated San Diego Web Design Agency
Over 175 Reviews with average of 4.9 Stars

Google Clutch UpCity Yelp

OUR WORK

The Proof is in the fly Pudding

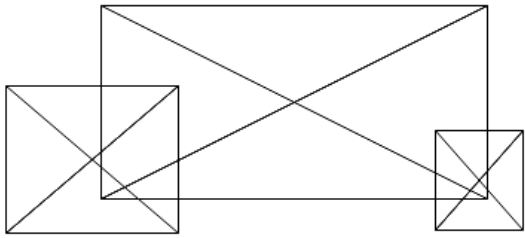
Frog

Logo Our Work Services Our Team Frog Blog [Get Started](#) Contact 619-202-7542

Custom Web Design for Financial Advisors

Say Goodbye to Customized Web Templates

[Get Started](#)



Upgrade to a Custom Website Design




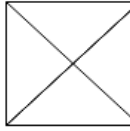
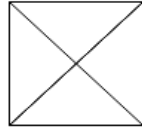



Build your website from the ground up, just like a custom home.
Upgrade from the limited web solutions like Twenty Over Ten and FMG Suites.
Customize your site to your niche & expertise, so you can maximize your marketing & web presence.

Your business deserve a website that...

- creates a unique visual design identity
- speaks to your niche & expertise
- is built on an intuitive WordPress platform
- & includes security / accessibility best practices

Our Work

100% Custom Design.
We never use pre-designed templates. They're for the flies

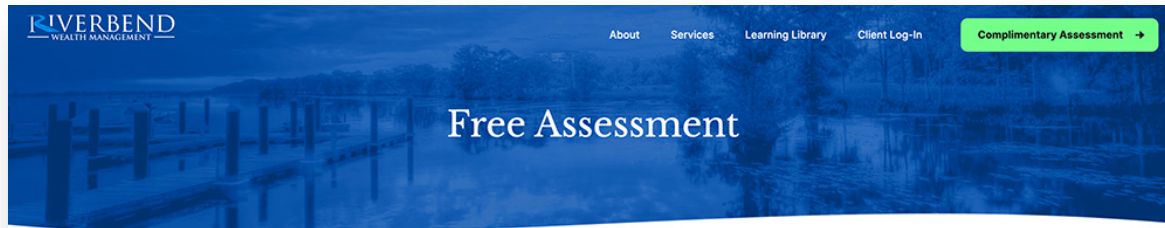
Conversion Objectives



- Email Opt-In
- Due Diligence
- Lead Generation
- Education



Call to Action



Free Assessment

Why

To help evaluate your retirement path.

What

A free assessment using our FLOW™ framework that will give clarity on your retirement path.

Who

Business owners and retirees who want to transition to and maintain a successful retirement.


No Cost or Obligation
We want you to know exactly how we can help before you pay us a single dollar.

Three Big Answers
Get clarity on your path to retirement and answers to the three big questions

15-Minute Call
The first step is a 15-minute phone call with our team.

How Do I Know If I'm a Good Fit?

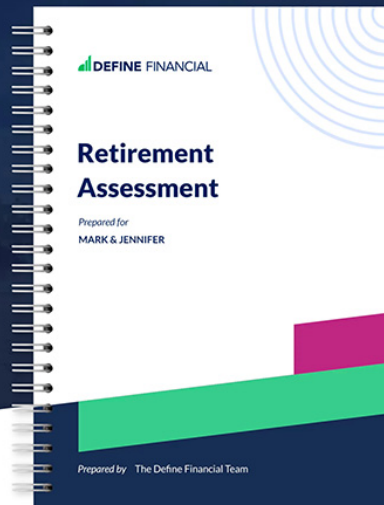
Our ideal client has as least \$500K in investable assets, and fits in one of the following buckets:



Your Free Retirement Assessment™

A 3-step process to help you evaluate our services and make an informed decision about working together.

- ✓ Tax Return Analysis
- ✓ Investment Analysis
- ✓ Retirement Recommendations

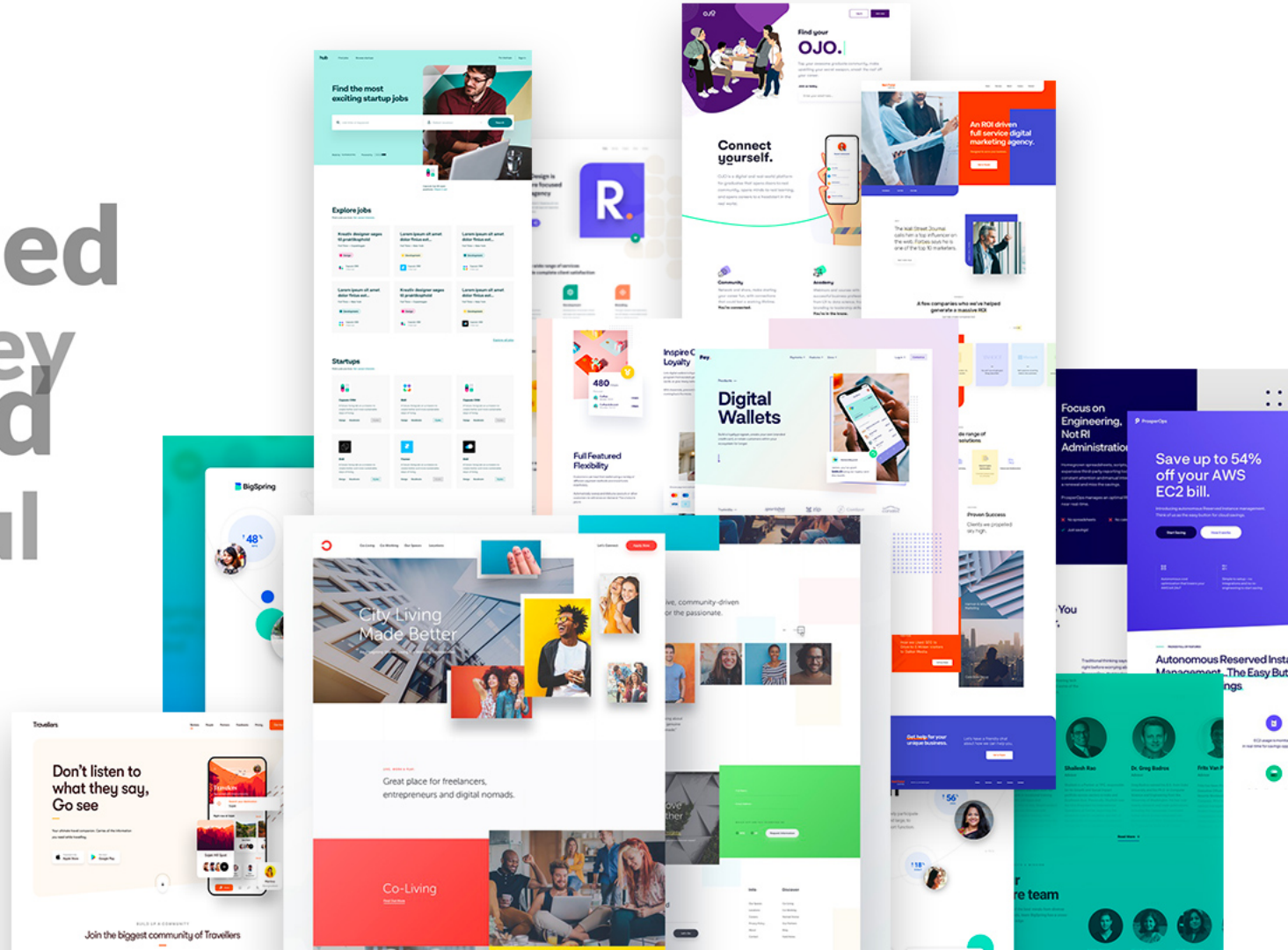


We are retirement planning experts and do our best work with:

- Aged 50+**
Retirement investors over age 50 who are retired or want to make "work optional" in the next 5 years.
- \$1 Million+**
Diligent savers who have accumulated investments of \$1 million or more. (Excluding real estate.)
- Expert Guidance**
People who value hiring an expert because they know their retirement is too important to manage it alone.

Personality of Brand

Relieved
Customer-Focused
Professional
Silicon Valley
People-Focused
Modern
High-Tech
Playful



Custom Design

Who We Are What We Do Real Estate Professionals Resources Client Access **Get Started**

Get organized. Make a plan. Enjoy your life.

A PROVEN PROCESS TO OPTIMIZE YOUR FINANCIAL FUTURE

Get Started

Your trusted financial advisor for comprehensive planning

Serving you face-to-face in Spokane, WA or virtually across the United States

It's one thing to have a written plan identifying the steps to reach your goals. It's quite another to follow through. At Quantum, we believe reaching your goals will require making adjustments as the plan unfolds. That's how and why we've seen success for our clients time and time again.

Serving clients since 1979	Assets Under Management* \$386,509,335	Average Client Tenure* 12.82 years
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*All stats are as of 9/30/2020

The Quantum Process

PROVEN TO GIVE YOU PEACE OF MIND

A financial plan is not the same as financial planning. Financial Planning is a process, not an event. With our proven Quantum Process we follow the steps needed to get you organized, help you follow a plan and ultimately enable you to realize your dreams.

[Learn more](#)

Who We Are What We Do Real Estate Professionals Resources Client Access **Get Started**

Financial Planning for Top Producing Real Estate Professionals

Helping You Build Wealth on a Solid Financial Foundation

Get Started

Get organized. Make a plan. Enjoy your life.

As a Top Producing Real Estate Professional your wealth is closely tied to the success of the real estate market. While this can lead to significant personal income, it can also leave you vulnerable to the market's highs and lows. You have the ability to effectively manage and bring stability to your commission-based income and create a net worth that leaves your future on real estate.

Our independent financial planning firm works with real estate agents who make \$50,000 or more in annual gross commission income to gain more control and predictability over their future and financial success.

Our team of financial planning partners with Top Producers to set and achieve their personal financial goals. Employing our process for you, we help optimize your use of your variable income and bring balance your net worth while reducing dependence on real estate.

How We Help

Exclusively provided to top producing real estate professionals

<p>Strategically Manage Wealth We build a financial plan designed for your entire situation, including cash management, capital gains, monthly, loan management, and tax considerations.</p>	<p>Optimize Variable Income We identify strategies to help stabilize variable income so that even in down markets, you don't have to sacrifice the lifestyle you've come to enjoy.</p>	<p>Balance Net Worth We construct investment portfolios that expertly diversify real estate as an asset class to limit your reliance on real estate and bring balance to your overall net worth.</p>
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Industry leading technology

Our innovative financial planning software allows us to collaborate on a multitude of financial planning topics, employ scenario modeling and advice, securely share your personal documents, and link all your personal financial accounts to one central hub. Whether you are on the edge or logged in on your computer, you have access to your full financial picture.



Who We Are What We Do Real Estate Professionals Resources Client Access **Get Started**

Services

- Goal Setting
- Commission Income Management
- Financial Plan Optimization
- Investment Planning
- 1039 & Real Estate Tax Planning Strategies
- Insurance Analysis
- Rental Real Estate Modeling
- Debt & Mortgage Analysis
- Estate Planning Review
- Net Worth Construction Review

What we handle for you behind the scenes

Our proprietary process allows you to delegate essential financial needs to us so you can focus on your business. Monthly topics we cover on your behalf include:

- Financial Planning
- Investments
- Collaboration
- Tax

January	Goal Setting
February	Top Producer Cash Management Plan
March	Asset Allocation Rebalanced
April	Net Worth Diversification
May	Semi-Annual Planning Session
June	Income Tax Review
July	Evaluate Rental Real Estate
August	Top Producer Cash Management Plan
September	Asset Allocation Rebalanced
October	Quarterly Debt Usage
November	Semi-Annual Planning Session
December	Goal Review

Who We Are What We Do Real Estate Professionals Resources Client Access **Get Started**

Meet the team

 C. ERIC CHRISTENSEN, CFP® Financial Planner	 MICAH COSKI, CRPC® Financial Planner	 JORDAN CURNUTT, CFP® Financial Planner
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 MARK COSKI Financial Planner	 TAWNEY PITTS Planning Associate	 CAITLIN LEWIS Client Service Manager
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TAWNEY PITTS
Planning Associate

CAITLIN LEWIS
Client Service Manager

Who We Are What We Do Real Estate Professionals Resources Client Access **Get Started**

Complimentary Insight Meeting

Schedule Your No-Cost Insight Meeting

Generally, the initial insight meeting lasts 60 minutes, and can be scheduled as either a face-to-face meeting or a virtual meeting. The goal of this meeting is for you to get a feel for the services we offer and for us to identify the areas that best address your financial planning needs.

You do not need to bring anything to your insight meeting. If you have specific concerns or are interested in engaging in our Quantum Financial Planning process, we may want to bring to your attention.

Still have questions? Visit our FAQ page.

- 100% No Cost
- 60 Minute Meeting
- Available Anytime

Who is the Quantum Process designed for?

- You are within 5 Years to Retirement
- You have over 175K+ Investable Assets
- You have a desire to make a plan for your financial future

Schedule your complimentary insight meeting

This is your opportunity to ask us questions and our opportunity to learn about your financial situation.

If you prefer to schedule via email or a phone call, please contact us.

QuantumTeam@QuantumPlanning.com or (509) 228-8653

Who We Are What We Do Real Estate Professionals Resources Client Access **Get Started**

Quantum Insight Meeting

Thank you for scheduling your complimentary meeting.

Select a Date & Time

Available Dates: 10/12, 10/13, 10/14, 10/15, 10/16, 10/17, 10/18, 10/19, 10/20, 10/21, 10/22, 10/23, 10/24, 10/25, 10/26, 10/27, 10/28, 10/29, 10/30, 10/31

Available Times: 10:00 AM, 11:00 AM, 12:00 PM, 1:00 PM, 2:00 PM, 3:00 PM, 4:00 PM, 5:00 PM

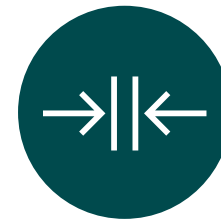
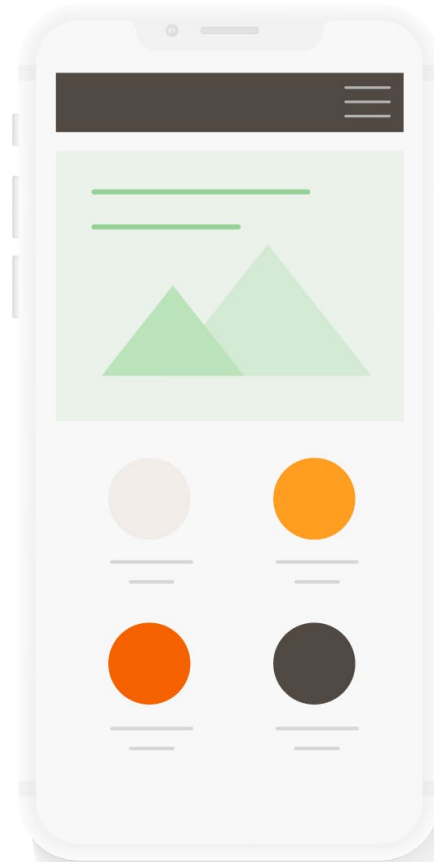
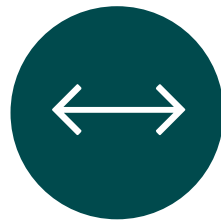
Buttons: Free, US & Canada Only

Custom Design Mobile-Wise Design

Choice of
imagery



Spacing



Breakpoints



User

Experience

Performance & Core Vitals

Latest Performance Report for: <https://tinyfrog.com/>

Report generated: Tue, Jan 12, 2021 8:39 PM -0800
Test Server Location: Vancouver, Canada
Using: Chrome (100.0.0.0)

Re-Test
Compare
Page Settings

GTmetrix Grade **B**
Performance **77%**
Structure **88%**

Top Issues

These audits are identified as the top issues impacting your performance.

IMPACT	AUDIT
Med-High	Eliminate render-blocking resources
Med	Avoid an excessive DOM size
Med-Low	Serve static assets with an efficient cache policy
Low	Avoid long main-thread tasks
Low	Reduce JavaScript execution time

Page Details

Your page content is broken down into the following:

4.1s
Fully Loaded Time

Performance 51, Accessibility 92, SEO 83

Performance 51

Metrics

First Contentful Paint	0.8 s	Time to Interactive	6.0 s
Speed Index	3.5 s	Total Blocking Time	1,290 ms
Largest Contentful Paint	0.8 s	Cumulative Layout Shift	0.0

Values are estimated and may vary. The performance score is calculated directly from these metrics. [See calculator.](#)

- Avoid chaining critical requests — 5 chains found
- User Timing marks and measures — 3 user timings
- Keep request counts low and transfer sizes small — 86 requests • 1,727 KiB
- Largest Contentful Paint element — 1 element found
- Avoid large layout shifts — 5 elements found
- Avoid long main-thread tasks — 20 long tasks found
- Avoid non-composited animations — 1 animated element found

Passed audits (21)

Overview

Recommendations 10 of 18

Summary (with browser caching)
See results without caching

Render start	Visitor complete	Render complete	Requests	Size
2.40s	3.00s	4.28s	26	153KB

Recommendations

Put CSS before blocking JS

If it's impossible to remove all the blocking JavaScript files, move all CSS requests above them in the page. Otherwise, these requests can't be made until the JavaScript completes, which will add length to the page load. You host 3 such files, and load 3 from third parties. There are a number of plugins that can help order your files correctly.

Consider putting as much JS in the footer as possible so that it processes after the DOM is rendered.

Learn more:

- Yahoo! best practice: Put Stylesheets at the Top
- Video: 7 Steps for Front End Optimization
- Video: Speedy Plugins
- WordPress plugins that minify your JS
- WP Beginner guide to moving JavaScript to the footer
- Suggested Plugin: WP Rocket
- Suggested plugin: Autotimize (Combines and minifies CSS, JS, and HTML)

Raw data [show raw data](#)

Combine CSS files

Your page loads 2 CSS files from your domain. Combining these into one will reduce overhead from the browser making separate requests. There are a number of plugins that can help order and combine your files correctly.

Note that certain plugins and themes don't properly enqueue CSS files which can make it hard to minify or combine them.

Tip: Also minify the CSS once you have combined it.

Web Accessibility



- Why Web Accessibility Matters
- Legal Landscape
- WCAG 2.1 AA
- Best Practices for Alt Text, Video, Color Contrast





Color Contrast

- WCAG 2.1 AA Standard
- Color Contrast Tool
- Open Design Layouts

Contrast Checker

[Home](#) > [Resources](#) > Contrast Checker

Foreground Color
#FFFFFF
Lightness 

Background Color
#7A94F0
Lightness 

↔

Contrast Ratio
2.86:1
[permalink](#)

Normal Text

WCAG AA: **Fail**
WCAG AAA: **Fail**

The five boxing wizards jump quickly.

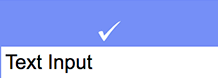
Large Text

WCAG AA: **Fail**
WCAG AAA: **Fail**

The five boxing wizards jump quickly.

Graphical Objects and User Interface Components

WCAG AA: **Fail**

Text Input 

Related Resources

- [Contrast and Color Accessibility](#)
- [Quick Reference: Testing Web Content for Accessibility](#)
- [Web Accessibility for Designers](#)
- [Link Contrast Checker](#)

RETIREMENT PLANNING STRATEGIES, IN PLAIN ENGLISH.

Lower taxes, invest smarter, and make work optional.

TOP 10
FORBES
Finance Podcast

TOP 50
APPLE
Investing Podcast

NAMED
TOP 5
Financial Advisor
in the U.S.

Get in touch →



Investopedia
NAMED #2 FINANCIAL ADVISOR IN U.S.

There are 100,000+ independent financial advisors in the U.S. The Investopedia 100 spotlights the top financial advisors in the country, and Taylor Schulte was awarded the #2 spot.

#2

PROGRESS, NOT PERFECTION

- Focus on UX & Digital Brand
- Identify Conversion Objectives
- Create a High-Quality Design
- Build for Performance
- Follow Web Accessibility Guidelines
- Retain trusted partners



LIMITLESS
COACHING PATH



LIMITLESS Q&A