

Life transitions are often overwhelming.

With so many questions, it can be difficult to decide how to move forward. But with the right assistance, your transition can actually be an empowering experience. At Phase 3 Advisory Services, we provide financial guidance and advice for women in transition.

- Divorce
- Recently lost your spouse
- Experiencing significant life change

We are here to help guide, educate and empower you.



Weathering the storm to financial independence

At Phase 3 Advisory Services, Jim Uren, CFP® is dedicated to helping you weather any financial season. He will help guide you through times like these, full of stormy volatility, change and confusion. For over 11 years, he has been helping women preserve their standard of living through the use of prudent and effective financial management.



Jim Uren, CFP®

Why Phase 3 Advisory Services

For Jim, helping clients after the loss of a spouse or divorce is more than his job – it is his passion and his calling.

- Academically trained as a counselor with a master's degree in counseling psychology
- Available to help you understand and explore all of the options available to you
- He will carefully review your current financial situation
- Recommend appropriate changes to help you preserve and grow your personal wealth as you move forward into financial independence.

Workshops for Women in Transition

As part of our commitment to educate and empower you, we also offer special workshops specifically designed as a resource for women in transition throughout the year. If you would like to be notified about one of our upcoming workshops, please call our office or email us at phase3@phase3advisory.com.

**Let us help you during this challenging transition.
If you would like to find out more about Phase 3
Advisory Services and how we can help you,
contact our office to set up a complimentary consultation.**



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PHASE **3** ADVISORY
SERVICES



Weathering Any Financial Season

Security and advisory services offered through Royal Alliance Associates, Inc. Member FINRA/SIPC.

Advisory services offered through Phase 3 Advisory Services, Ltd., a registered investment advisor not affiliated with Royal Alliance Associates, Inc.