

Planning isn't about predicting the future. It's about being ready for it.

Discover how a customized financial plan can help you live with purpose, protect what matters, and navigate every chapter ahead.

Our Philosophy

At Prime Capital Financial, we believe financial planning is where every great financial relationship should begin.

Because a strong plan doesn't just show you where you're headed. It shows you how to get there, what to avoid along the way, and how to stay aligned with what matters most.

We don't lead with products or performance. We lead with purpose. Your purpose.

Our financial planning process is built to:

- Bring structure to your goals
- Offer clarity amid complexity
- Build confidence in uncertain times



"A great financial plan doesn't just give you answers. It gives you confidence."

- Mary Lucas, National Director of Financial Planning & Client Experience

The Planning Process

A clear path. A collaborative process. A plan that grows with you.

We start by understanding your life, not just your assets. Then, we build a personalized plan that adapts with you.

Step 1: Discover

We begin with deep discovery - what you value, what you want to achieve, and what keeps you up at night.

We review everything from income and expenses to assets and liabilities.

Step 2: Design

Next, we build a customized plan that aligns every part of your financial life - investments, retirement, risk, taxes, and estate strategy.

Step 3: Implement

Together, we put your plan into action with careful coordination and full transparency. Every recommendation is intentional and tailored to your goals.

Step 4: Refine

Life changes. So does your plan. We revisit your strategy regularly and make adjustments as your needs evolve, because real planning is never one-and-done.

Why It Matters

Financial planning isn't just about retirement. It's about life.

Whether you're building your career, raising a family, selling a business, or preparing for retirement, your financial plan should serve you at every stage.

A strong financial plan helps you:

- Make smarter decisions today
- Feel more confident in volatile markets
- Prepare for the unexpected
- Reduce tax burdens over time
- Create a lasting legacy

We don't build cookie-cutter solutions. We build living, breathing plans that reflect your life, and help you live it with purpose.

MEET YOUR PLANNING TEAM

Financial planning isn't just about retirement. It's about life.

At the heart of our planning approach is Mary Lucas, Director of Financial Planning. Mary and our extended team of credentialed advisors collaborate with you to build a financial plan that reflects not just your wealth, but your why.



“My passion is helping people turn financial uncertainty into long-term clarity. Every client’s story is different, but the value of a plan is universal.”
- **Mary Lucas**

With national reach and personalized service, Prime Capital Financial brings the full power of our planning resources to every client relationship.

Ready to turn uncertainty into clarity?

Let’s start the conversation. Schedule your complimentary planning consultation today.

Advisor Name: _____

Phone: _____

Email: _____

primefinancial.com/financial-planning

