A photograph of a young woman with dark hair, smiling and looking off to the side. She is wearing a bright yellow sleeveless top. The background is a blurred indoor setting, possibly an office or a modern building interior.

Break through to your personal or business best

**Develop the right money habits and mindset
to make your mark.**

Work with us to build the skills you need to raise your level of success.



The Opal Way

Our commitment to your fulfillment.

Opal Wealth Advisors isn't your ordinary wealth management firm. Traditional advisors may help you gain financial independence, meaning you no longer have to work. But Opal's support goes further. We aim to empower you to achieve true financial freedom—which means fully enjoying a life of purpose, as defined by you.

Our three-step Opal Essence Process is the foundation of our proprietary approach to helping you create the life you want, now and in the future.

Our Opal Essence Process



1/

CULTIVATE THE RIGHT **MONEY** HABITS

Develop effective behaviors to build and maintain wealth.



2/

ESTABLISH A **MINDSET** OF SUCCESS

Transform limiting money beliefs into drivers of accomplishment.



3/

SUCCEED AT MAKING YOUR **MARK**

Use the power of purpose to achieve your highest aims.

Many Pathways. One Goal.

Your version of success is achievable.

Opal believes in the uniqueness of your journey toward a universal goal. Everyone wants a life of financial freedom, joy and abundance—but the vision is different for each of us. So we support you in clarifying your goals and creating an actionable roadmap, which is half the work.

The other half is successfully navigating your roadmap to achieve your goals. We know from long experience that most of us have deeply rooted habits and beliefs holding us back from accomplishing what we set out to do. To empower, encourage, and equip you with the skills you need to close the gap between setting goals and achieving them, we founded Opal Institute.

Opal Institute

Customized coaching for greater success.

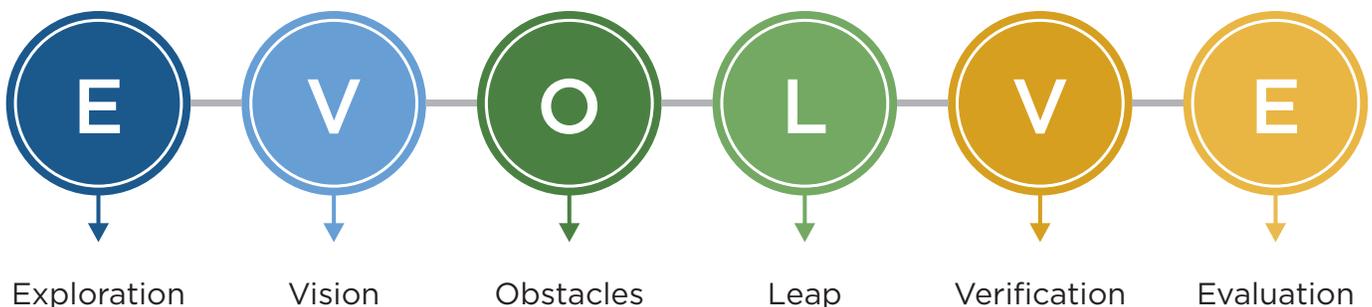
Opal Institute offers an array of specialized coaching programs to bridge the gap between intention and achievement. Our services range from one-on-one sessions to larger group workshops and seminars.

Opal Institute provides performance coaching for:

- Individuals and Families
- Businesses and Professionals
- Financial Advisors

Our team works closely with you to design an approach that's appropriate for you, your family, and/or your business. Each coaching program is carefully tailored to your particular needs, but all adhere to our time-tested Opal Institute EVOLVE Process.

Opal Institute EVOLVE Process

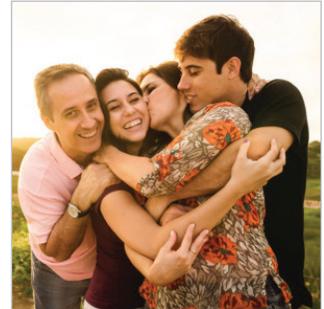


Coaching for Individuals and Families

Fulfill the vision you have for your life and the people that matter to you.

Ways We Can Work Together

- Opal Wealth Management Client Curriculum: seminars/workshops on creating wealth
- Opal Money Empowerment Curriculum: seminars/workshops on creating comfort with financial freedom, joy, and abundance
- Financial Therapy: individual and family sessions to help modify behaviors that constrain your financial freedom
- Customized Seminars: family retreats tailored to your needs and tastes
- Performance Coaching: one-on-one sessions to address your specific challenges



Topics We May Cover

- Anything and everything relating to what you want out of life and what fulfills you

Coaching for Businesses and Professionals

Reach the highest levels of business satisfaction, performance, and profit.

Ways We Can Work Together

- Opal Professional Development Curriculum: seminars/workshops
- Opal Business and Professional Consulting: customized services
- Executive Performance Coaching: one-on-one sessions
- Business and Professional Retreats: tailored formats and agendas



Topics We May Cover

- Company growth: create inspiring plans for future expansion
- Charisma: how to profoundly influence people
- Team dynamics: build effective and productive teams and partnerships
- Talent recruitment: find the right professionals to boost your team
- Leadership: inspire and empower others
 - Paradigm shifts and how we perceive
- Public speaking/communication: making a real connection
 - Put fears aside and inspire others
 - Story telling and listening skills
- Organizational development: integrity, responsibility, and authenticity
 - Create a culture of accountability
 - Elevate performance across the company
 - Analyze and improve core values, vision, and culture





Coaching for Financial Advisors

Break through limitations and add greater value to client relationships.

Ways We Can Work Together

- Performance Coaching: one-on-one sessions
- Opal FA Curriculum: seminars and workshops

Topics We May Cover

- EVOKE® methodology for client engagements
- Predictive Index: team building and performance inspiration
- DataPoints: client relationships and coaching
- The curious and interesting impact of being with people
- Opal Wealth Advisors core values, vision, culture
- Money/Mindset/Mark: the Opal Essence Process
- How to use Opal tools and technologies

Speaking Engagements for Advisors' Clients

Highlight your commitment to client well-being.

You can also invite an Opal coach to speak at your client and/or prospect meetings, events, consultations, and retreats. We will customize the program to suit your audience.



Develop a Mindset of Success and Achieve What's Most Important to You

Our well-respected Opal Institute coaches have been helping successful individuals, families, professionals, and entrepreneurs break through limitations for more than 25 years—and they truly “walk the walk.” They understand the challenges and thought processes involved in altering your financial future because they’ve lived it.

Jesse Giordano, CFP® **Financial Advisor, Principal**

Jesse Giordano provides fresh perspective on wealth management for investors, businesses, and financial advisors. An accomplished speaker and coach, he inspires success. Through a proven approach, Jesse shows how dreams that seemed out of reach are entirely achievable.



Charles Clement **Chief Development Officer**

Charles Clement specializes in helping people tap into unrealized potential in order to achieve remarkable results. With expertise in team building, leadership development, and performance coaching, he is a sought-after trainer who champions creating the life you truly want.



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