

**Question 1: How do you usually describe what your company does in just a sentence or two? This doesn't have to be polished! Just say it how you naturally explain it to someone new. \***

We help everyday families make smart financial decisions, whether that's budgeting, saving for college, planning for retirement, or just figuring out where to start. At Nest, we offer financial planning that fits real life. No wealth required, no judgment, and no pressure to "know it all" already. Just clear, personal guidance from people who get it.

**Question 2: Who do you serve? (Your customers, clients, users, members - however you label your audience. Describe your ideal customer or audience in detail. Consider their role or industry, company size, if relevant, common traits, characteristics, or values they share.) \***

We work with people who are doing their best to build a stable, secure life but don't always feel like they're "doing it right." Our clients are often in their 30s to 50s, raising kids, juggling careers, maybe caring for aging parents too. They've got goals—buying a house, saving for college, getting out of debt, but money always feels tight. Many of them have never worked with a financial advisor before because they assumed they didn't qualify, didn't have "enough," or would feel talked down to. We're here to change that.

**Question 3: What are your ideal customers trying to achieve? What problems are they trying to solve when they choose you? What positive outcomes, goals, or improvements do they care about most? Be as specific as possible. \***

They want to feel more in control of their money and more confident in their decisions. Some are working toward specific goals, like buying their first home, saving for a child's education, or preparing for retirement. Others just want to stop feeling stressed every time they look at their bank account. They want to understand where their money is going and whether they're on the right track. The common thread is: they want clarity, peace of mind, and a plan that fits their real life—not someone else's idea of what financial success should look like.