

INITIAL CONSULTATION

This hour is spent primarily getting to know you, your objectives, and determining if we can add value in your world by creating a financial partnership. Disclosures and fees are discussed.

FINANCIAL WEBSITE ONBOARDING

During this 30-minute Zoom, we integrate your goals and information to the financial website, the tool designed to provide you with clarity and peace of mind.

PLAN DEVELOP

Think of this as laying the foundation for developing your financial plan. We confirm where you are today and where you wish to be in the future.

PLAN DESIGN

Your custom-designed financial plan is presented, the roadmap for you to get where you want to go.

IMPLEMENTATION

You have made decisions and you are taking actions towards your goals!

WRAP UP

Congratulations! You have completed the new client process. We celebrate your accomplishments and set the framework for continuing to monitor your goals.

SERVICE REVIEWS

These meetings are held generally annually or semi-annually and are designed to ensure we continue to defend and customize your financial plan as life changes.

