

External Process Overview

1. Discovery Meeting
2. Whiteboard Session
3. Plan Proposal
4. Plan Development
5. Plan Delivery & Deployment
6. Ongoing Strategy Sessions

Discovery Meeting

- Introduction to firm's philosophy, process, and planning services
- Discuss goals, concerns, and current financial situation details

Whiteboard Session

- Dynamic Q&A to further identify areas of focus and prioritize objectives
- Discuss potential strategies
- Client brings remaining "document checklist" items and completes risk-tolerance questionnaire
- Schedule next meeting

Plan Proposal

- Planning/consulting proposal with outlined objectives, expected services, and total planning fee.
- Client and advisor sign planning engagement.

Plan Development

- Firm collects outstanding information and constructs plan

Plan Delivery & Deployment

- Team discusses options and customizes recommendations designed to help client meet their goals.
- Work with client and their other professionals to implement designated action items

Ongoing Strategy Sessions

- Meet throughout the year to review goal progress and update the plan based on changing financial, family or tax situations.