

## FINANCIAL PLANNING PROCESS

### 1 DISCOVERY MEETING

In the Discovery Meeting our goal is to identify your values and concerns. How does your family fit in your plan? Who is your current team and how do you feel about money and service expectations?

### 2 REVIEW PRIORITIES

Through the Discovery Meeting we learn about your priorities and what aspects of your financial situation are most important to you. We will review those financial priorities that you want addressed.

### 3 PROPOSE RECOMMENDATIONS

Based on your financial priorities and areas that we feel need addressing, we will propose recommendations to get and keep you on track toward financial security and independence.

### 4 ESTABLISH PRIORITY ACTION PLAN

With our recommendations and your input on important priorities, we will agree on an action plan to work on the items you would like to address in the near future.



### 5 IMPLEMENT ACTION ITEMS

As we complete our due diligence and paperwork, we will meet to sign agreements and forms necessary for moving forward with your financial priorities.

### 6 MONITOR PROGRESS

We will review the progress and implementation of your financial priorities. Our goal is for a smooth transition and efficient delivery of products and services designed to meet your goals.

### 7 REVIEWS AND REPORTS

As times goes by, new strategies may be needed to keep you on track as well as implementation of items that were not previously addressed. Performance reports will also be provided on investment accounts on a periodic basis.