balancewealthadvisor.com
Wellesley, MA - Providence, RI | 877-903-7222

Model Week for Balance Wealth Advisors Wellesley, MA Office.

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00 AM		Networking Meeting		Networking Meeting or Workout at gym	
9:00 AM	In by 9am Voice Mails & Emails	LinkedIn 20 minutes Facebook 20 minutes	In by 9am 1/2 hr. prep	LinkedIn 20 minutes Facebook 20 minutes	In by 9am
10:00AM	Meeting with BWA Team – 1hr	**David in RI**	**Client Appt Leo W to assist**	Voice Mails and Emails	Voice Mails and Emails
11:00AM	1/2 hr. prep	Voice Mails & Emails	1/2 hr. follow up 1/2 hr. prep	Branch Meeting every Thurs 11:00am-12pm	Complete Paperwork
12:00PM	**Client Appt Leo W to assist**	1/2 hr. prep	**Client Appt**	COI lunch in office 12:30pm	
1:00 PM	1/2 hr. follow up 1/2 hr. prep	**David in RI Leo W solo apt**	1/2 hr. follow up 1/2 hr. prep	Prep for calls	Weekly mtgs with Advisors 1pm-2pm
2:00 PM	**Client Appt**	1/2 hr. follow up 1/2 hr. prep	**Client Appt Hunter D to assist**	**Client conference calls by apt. WebEx Sessions & return emails 1:30pm-4:30pm Hunter D to assist**	Review prep for next week's mtgs
3:00 PM	1/2 hr. follow up 1/2 hr. prep	**David in RI Leo/Hunter apt**	1/2 hr. follow up 1/2 hr. prep		
4:00 PM	**Client Appt Hunter D to assist**	1/2 hr. follow up 1/2 hr. prep	**Client Appt Leo W to assist**		Finish & submit all paperwork
5:00 PM	1/2 hr. follow up 1/2 hr. prep	**Client Appt Leo W to assist**	1/2 hr. follow up Leave by 5:00pm	**Client Appt**	Leave by 5pm
6:00 PM	**Client Appt Leo W to assist**	1/2 hr. follow up 1/2 hr. prep		1/2 hr. follow up 1/2 hr. prep	
7:00 PM	1/2 hr. follow up	**Client Appt Hunter D to assist**		**Client Appt Hunter D to assist**	
8:00 PM	Leave by 7:30pm Workout at gym	1/2 hr. follow up		1/2 hr. follow up	
9:00 PM		Leave by 9pm		Leave by 9pm	

If you need to reschedule your appointment, please contact us at 781-772-2470 or appointment@balancewealthadvisor.com
If you have a specific case manager that you prefer to interact with, please see when they are assisting David with his meetings. Additionally, each Financial Advisor/Case Manager has phone call return times scheduled if these are more convenient for you:

Leo White, Financial Advisor (781) 772-2476 lwhite@balancewealthadvisor.com **Tuesday or Friday 9am-2pm**
Hunter Dempsey, Paraplanner (781) 772-2482 hdempsey@balancewealthadvisor.com **Wed 3pm-6pm or Fri 11am-2pm**
David Allen, Financial Advisor (781) 772-2459 dallen@balancewealthadvisor.com **Tuesday 12-5 & Thurs 1:30pm – 6:30pm**

We will generally send you a Zoom or WebEx link so that you can see our computer screen and everything we are working on while we are talking on the phone.