



Initial Introduction & Confidential Discovery Interview:

- Discuss objectives, lifestyle, needs/wants, risk tolerance and preferences
 - ◆ 45-60 minutes, with client by phone or video conference call

Data Gathering:

- Most Secure Option (Website Data Entry)**
Complete the Personal Financial View website registration process (a link will be emailed to you)
 - ◆ Enter your information into your new individual client Organizer
 - ◆ Statements and other documents can be directly uploaded to your encrypted Vault

~ or ~

- Less Technical Option (Secure Digital Upload)**
Complete the Cash Flow & Balance Sheet Questionnaire
 - ◆ An excel worksheet and document checklist will be provided
 - ◆ Worksheet and statements may be uploaded via secure cloud link

Data Verification (1-2 Weeks After All Data is Received):

- Discussion of long term strategies and a “what-if” scenario. Review of initial recommendations.
- Analysis of financial holdings which may include, but not limited to:
 - ◆ Cash accounts, investments, insurance policies, real estate and employer benefits

Recommendations, Action Plan and Strategy Implementation (1-2 Weeks Later):

- Review recommendations and discuss priorities for an action plan
- Initiate implementation of strategies as needed, with the institutions of your choice

On-going Planning Relationship

- Review common topics “seasonally”, after initial annual goals are addressed
- Collaborate throughout the 12-month planning engagement, as needed
- Update accounts, objectives, household status and/or personal information
- Monitor progress of goals and adjust strategies when necessary
 - i.e.: “Are you on track?”
- Annual review of planning needs and fee agreement



Schedule a meeting with me at calendly.com/planningforgood

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