



## The Financial Planning Process

What should I expect during the Financial Planning Process? What are the steps in the Financial Planning Process? How long does it take? These are some of the more commonly asked questions about the planning process.

A written financial plan is an ongoing process that requires a dedicated commitment of time from the client. The complete planning process usually involves two or three meetings as well as telephone and e-mail correspondence over a two to four month period depending on the complexity of the issues involved and the planner and client's respective schedules.

This flowchart provides a brief outline of the steps used throughout the planning, implementation and monitoring process.

