THE PROVISIO NEXT GEN SUBSCRIPTION

Initial Contact via Meeting, Call, or Zoom Conference

- You and your advisor will discuss your goals and your current financial situation
- You will receive a welcome packet and the opportunity to sign up for our weekly blog and monthly newsletter
- We will begin the process of opening your online investment account

Follow Up

- Following your initial discussion, you will be sent a welcome email with steps to continue
- You will receive a link to create your online account in our Guided Wealth Portfolios system as well as links to budgeting tools on our website

Review and Recommendations

- Your advisor will review your statements and assets and prepare a comprehensive recommendation
- Insurance quotes and applications will be available to you if needed
- At this time your next steps will be discussed

Progress Updates

- Periodical summaries of your progress will be sent to you in your preference of call or email
- We will schedule your 6-month review to confirm that your plan is on track and to make updates as needed