Seven Steps of Service

1

Initial Meeting

- Listen to what is important to you, your family and legacy
- Identify your unique challenges and circumstances
- Introduce our Philosophy, Plan and Process
- Receive Welcome Kit

2

Data Collection Meeting

- Gather data, documents and statements for analysis
- Bring personal device, all account login info for personal financial website
- Discover How and where we can add value

3

Financial Plan Presentation Meeting

- Review current and future investment approach
- Review possible scenarios
- Present recommendations based on plan output
- Provide personal financial organizer binder

4

Implementation Meeting

- Complete paperwork (bring SSN's for beneficiaries, and a voided check)
- Complete rollover calls if necessary

5

30 Day Follow-Up Meeting

- A member of our team will call to give you a status update
- Help you login to your accounts
- Follow-up for any lingering questions you may have

6

60-90 Day Wealth Team Integration

- Coordination with your other financial professionals
- Communication regarding tax reporting methods, capital gains, health insurance, Medicare options, etc. as needed

7

Ongoing Strategy Meetings

- Dependent on your needs, you can meet with or speak to your advisor semi-annually or annually

BRIDGETOWN™
WEALTH MANAGEMENT