



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<br>or Workout at gym  |                                      |
| 9:00 AM | In by 9am<br>Voice Mails & Emails           | LinkedIn 20 minutes<br>Facebook 20 minutes  | In by 9am<br>1/2 hr. prep                   | LinkedIn 20 minutes<br>Facebook 20 minutes   | In by 9am                            |
| 10:00AM | Meeting with<br>BWA Team – 1hr              | <b>David in RI</b>                          | <b>Client Appt<br/>Leo W to assist</b>      | Voice Mails<br>and Emails  | Voice Mails<br>and Emails            |
| 11:00AM | 1/2 hr. prep                                | Voice Mails & Emails                        | 1/2 hr. follow up<br>1/2 hr. prep           | Branch Meeting every<br>Thurs 11:00am-12pm   | Complete Paperwork                   |
| 12:00PM | <b>Client Appt<br/>Leo W to assist</b>      | 1/2 hr. prep                                | <b>Client Appt</b>                          | COI lunch in office<br>12:30pm   |                                      |
| 1:00 PM | 1/2 hr. follow up<br>1/2 hr. prep           | <b>David in RI<br/>Leo W solo apt</b>       | 1/2 hr. follow up<br>1/2 hr. prep           | Prep for calls   | Weekly mtgs with<br>Advisors 1pm-2pm |
| 2:00 PM | <b>Client Appt</b>                          | 1/2 hr. follow up<br>1/2 hr. prep           | <b>Client Appt<br/>Geoffrey M to assist</b> | <b>Client conference<br/>calls by apt.<br/>WebEx Sessions<br/>&amp; return emails<br/>1:30pm-4:30pm<br/>Geoffrey M to<br/>assist</b> | Review prep for<br>next week's mtgs  |
| 3:00 PM | 1/2 hr. follow up<br>1/2 hr. prep           | <b>David in RI<br/>Leo/Geoff apt</b>        | 1/2 hr. follow up<br>1/2 hr. prep           |  |                                      |
| 4:00 PM | <b>Client Appt<br/>Geoffrey M to assist</b> | 1/2 hr. follow up<br>1/2 hr. prep           | <b>Client Appt<br/>Leo W to assist</b>      |  | Finish & submit<br>all paperwork     |
| 5:00 PM | 1/2 hr. follow up<br>1/2 hr. prep           | <b>Client Appt<br/>Leo W to assist</b>      | 1/2 hr. follow up<br>Leave by 5:00pm        | <b>Client Appt</b>   | Leave by 5pm                         |
| 6:00 PM | <b>Client Appt<br/>Leo W to assist</b>      | 1/2 hr. follow up<br>1/2 hr. prep           |   | 1/2 hr. follow up<br>1/2 hr. prep  |                                      |
| 7:00 PM | 1/2 hr. follow up                           | <b>Client Appt<br/>Geoffrey M to assist</b> |   | <b>Client Appt<br/>Geoffrey M to assist</b>  |                                      |
| 8:00 PM | Leave by 7:30pm<br>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](tel:781-772-2470) or [appointment@balancewealthadvisor.com](mailto: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](mailto:lwhite@balancewealthadvisor.com) **Tuesdays 9am-1pm**

**Geoffrey Morrissey, Paraplanner (781) 772-2458** [gmorrissey@balancewealthadvisor.com](mailto:gmorrissey@balancewealthadvisor.com) **Wed 3pm-6pm or Fri 11am-2pm.**

**David Allen, Financial Advisor (781) 772-2459** [dallen@balancewealthadvisor.com](mailto:dallen@balancewealthadvisor.com) **is available every Thursday from 1:30pm – 6:30pm** Here is the link to schedule directly on-line: <https://calendly.com/return-call-webex-bwa>

If you have specific questions or prefer to do your client service meeting by **phone**, please let us know what time **Thursdays** work best for you. Available times: 1:30pm, 2:00pm, 2:30pm, 3:00pm, 3:30pm, 4:00 pm or 4:30pm

Also, please let us know what the best number is to contact you during these times. We will also send you a WebEx link so that you can see our computer screen and everything we are working on.