

What to Expect

Personal Planning and Investment Management

We understand how helpful it can be to have an idea of what to expect when you begin working with our team. Below you will find a brief description regarding material we cover in meetings and an overview of how your planning comes to life. The timeline will be tailored to your needs and situation.

Getting Started

- Extended discussion on your situation, needs/wants, and how our partnership might look
- Discussion on expectation and risk tolerance
- Sign engagement agreements
- Data gathering for investment account statements, insurance policies, assets/liabilities inventory and other necessary documentation
- You receive the following visioning and planning worksheets to complete prior to your next meeting: Essential Questions, Envisioning Your Ideal Life, Personal Planning and Living Expenses

The Next 30 Days

- Visioning discussion over your completed exercises
- Sign new account paperwork, Investment Policy Statement and Addendums

Vision and Goals				
Retirement Planning	College Funding	Estate Planning	Insurance	Additional Goals

The Next 30-45 Days

- Meeting to present and confirm your Vision and Summary of Goals
The Vision and Goals are the heart of your financial plan. Once we are sure we've captured your true vision, we can solidify the order of presentation for your additional sections.
- Determine priority order for the additional pieces of your financial plan (these are inter-related and can be reviewed in any order you desire)

The Next 365 Days

- Over the course of our next few meetings, we will discuss and present the additional pieces of your initial financial plan (Average of 1-2 major goals every 90 days)
- Each meeting typically covers 1-2 goals as well as any residual pending activities from prior presentations

Ongoing Support

- Regularly scheduled meetings to review/update your financial planning
 - Platinum (Quarterly), Gold (Semi-Annually), Silver (Annually Strongly Suggested) - or as the need arises
- Ongoing investment management
- Regular communication, including quarterly performance reporting and 24/7 online Client Portal access to your portfolio as well as your financial plan