TOTUS | WEALTH MANAGEMENT

Text A Financial Question

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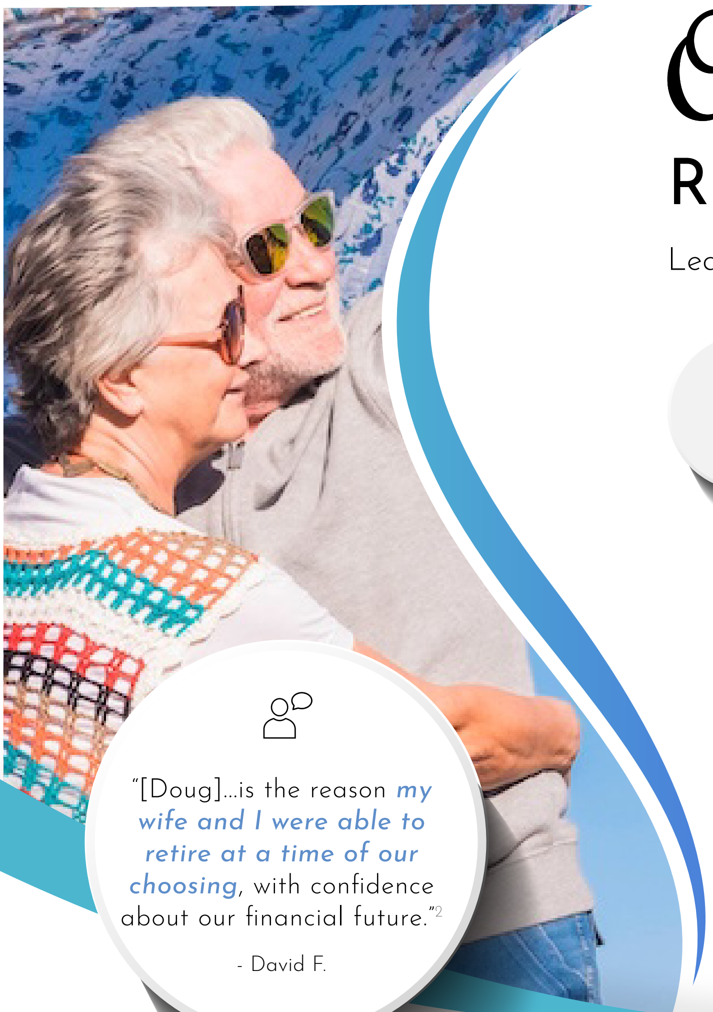


Onboarding
ROADMAP

Learn more about how we communicate and plan as a team.

- ✓ Schedule an introductory conversation
- ✓ Identify your desired focus areas
- ✓ Hold 'Ask A Question' meeting

- ✓ Discuss needs, goals, and priorities
- ✓ Begin holistic advice and plan preparation
- ✓ Schedule your follow-up meeting

Provide Complimentary Visual Financial Map

- ✓ Explore proposed recommendations
- ✓ Listen to your feedback and answer questions
- ✓ Discuss actionable next steps in detail

- ✓ Implement your family's financial plan
- ✓ Set expectations and explain ongoing support offered

"[Doug]...is the reason *my wife and I were able to retire at a time of our choosing*, with confidence about our financial future."[2]

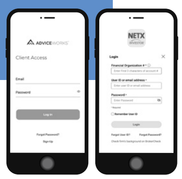
- David F.

Schedule ONLINE

Scan QR code or **click here** to book a 20-minute phone call.

ADVICEWORKS netxinvestor

Download the Apps Now



[1]Verbal authorization required, electronic instructions received via email, voice, or text message will not be processed.

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