



What to expect? (Our Process)

Meeting 1

Objective: During this meeting, we'll work together to develop a clear picture of what you're looking to achieve and what work you've done already.

- Fact Finding
 - Review of existing Accounts
 - Goal setting
-

Meeting 2

Objective: We will review and customize a specific action plan, including a timeline in order to make your goals become a reality.

- Preliminary Plan proposal
 - What accounts need to be opened or consolidated
 - Annual Advisor Fee applies to accounts opened and managed by Alison
 - How to fund accounts and in what order
 - Assignment of Tasks (Advisor and Client) for implementation
 - Other recommendations
 - Insurance
 - Family Trust
 - Tax Planning
-

Meeting 3:

Objective: Our goal is that our client walks out of this meeting feeling organized and confident in the plans we are working towards

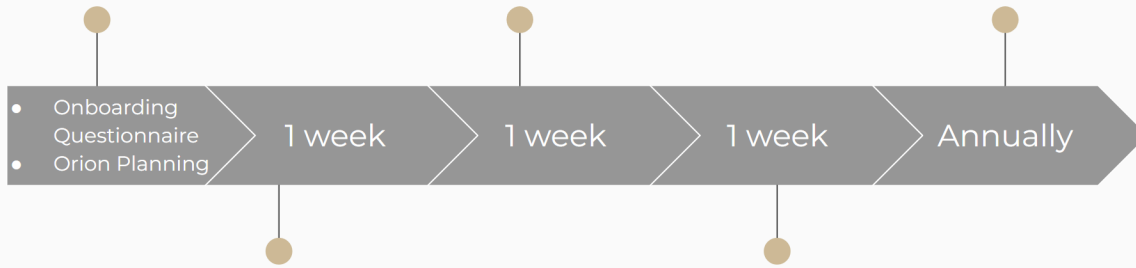
- Review of Account(s)
 - Confirm all account(s) were opened, without error and that beneficiaries are correct
- Get Access
 - How to log in and access all of your accounts online
 - How to read your statements

OUR PROCESS

Initial Consultation

Meeting 2 - Proposal & Recommendations

Annual Reviews Check Ins as needed



Meeting 1 - Fact Find & Goal Setting

Meeting 3 - Implementation & Review

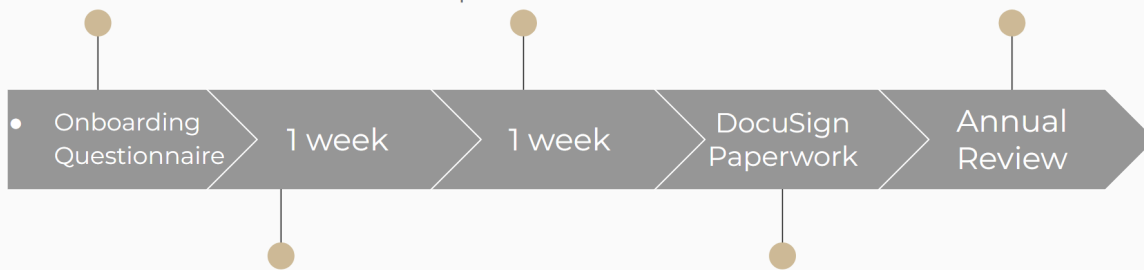


OUR PROCESS - Shortened

Initial Consultation

Meeting 2 - Proposal, Recommendations, & Implementation

Check Ins as needed



Meeting 1 - Fact Find & Goal Setting

Client Onboarding

