Foundation for Financial Success

BAIRD

Introduction Meeting

Opportunity to get to know each other and share information about our process

Discovery Meeting

In-depth review of goals, values, and your financial picture.

Wealth Management Proposal

Present plan, our investment recommendations, and identify areas of opportunity to add value.

Onboarding and Follow Up

Additional analysis, account transfers, and implementation of planning elements

Annual Reviews and Updates

Review of plan, progress, investment allocation, and market outlook.

Comprehensive Financial Plan

Plan includes diagnostic of current situation, our recommendations moving forward.

Your Professional Network

We work with your team of professional advisors (CPAs, Attorneys, and Insurance Specialists and/or refer when necessary).

2 – 4 Weeks → **Within 6 Weeks** → **Annually**