

Total Financial Picture™ Client Engagement Process

FINANCIAL PLANNING PROCESS

Step 1	Firm Documents / Financial Document Checklist
Step 2	Gather Financial Data & Establish Goals
Step 3	Analyze and Evaluate Financial Data
Step 4	Develop Recommendations / Alternatives
Step 5	Communicate Recommendations / Alternatives
Step 6	Implement Recommendations / Alternatives
Step 7*	Monitor Plan via Progress Meetings (*Plan Fee only)

APPOINTMENT PROCESS

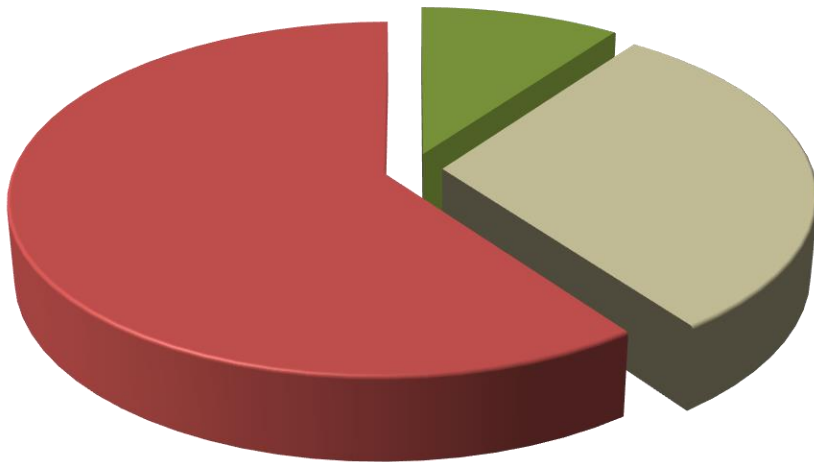
1.	Click here to schedule a 15-Min Intro Call
2	Vision Meeting (Benchmark, Goals, Develop Strategy)
3	Service Level Selection (Foundation / Comprehensive)
4	Analyze / Develop Recommendations
5	Financial Plan Presentation / Action Plan
6	Prioritize / Implement Financial Action Plan
7	Progress Meeting* / Annual Financial Review

Decision Points

Meetings



Why Work with us?



What You Know

What You Don't Know

What You Don't Know that you Don't Know

Many people are too busy with work, family, and life to optimize their current financial reality. To be of service, we are delighted to share a defined seven-step financial planning process to help identify **strengths, weaknesses** and **opportunities** for those seeking to improve their current financial reality or just want a second opinion.

Step
1

[Click here to see Why work with Us](#)

Step
2

[Click here to schedule an Intro-Call](#)

Step
3

Receive a Total Financial Picture™ review to identify **strengths, weaknesses, and opportunities** in your current financial reality

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