



Sterling Manor Financial, LLC

What to Expect: Financial Planning Timeline for New Clients

In order to ensure that you receive a high level of service from the very beginning of our relationship, you can anticipate the initial analysis and planning process will be based on the timeline below.

Step 1: Engage

(Day 1)

Complimentary Consultation:

Consultation to establish goals, expectations, experience and terms of the engagement.

Step 2: Analyze

(Weeks 2-4)

Data Gathering:

- Review Client Data Book
- Review Source Documents
- Reconfirm Goals & Next Steps

Meeting Date: _____

Step 3: Implement

(Weeks 4-6)

Implementation Meeting:

- Insurance Strategies
- Investment Strategies
- Education & Estate Planning
- May Require Multiple Meetings

Meeting Date: _____

Meeting Date: _____

Step 4: Review

(Ongoing)

Review:

- Quarterly, Semi-annual, or Annual Meetings
- Review Progress and Updates
- Impromptu Meetings/Calls/ Video Conferences available on request

First Review: _____

Draft Presentation:

- Review Draft Analysis
- Confirm Data Accuracy
- Identify Risks and Opportunities
- Discuss Implementation

Meeting Date: _____

Finalization Meeting:

- Confirm All Goals Have Been Addressed
- Review Summary Letter
- Provide Invoice
- Discuss Referrals

Meeting Date: _____