Client Engagment
ROADMAP

Discovery Meeting
1.
1. Getting to Know
2. Basic Data Gathering
3. Individual, Family & Business Goals
4. Risk Tolerance
5. Long-term Financial Plan

Homework
2.
1. Planning Data by client
2. Budget Data
3. Budget Analysis
4. Risk Management Analysis

First Planning Meeting
3.
1. Investment Analysis
2. Estate/Retirement/Tax /Education Planning
3. Initial Roadmap
4. Plan Priorities

Feedback & Plan review
4.
1. Feedback from Lawyer, Accountant & Business Consultant (as required)
2. Roadmap Review
3. Adjustments

Implementation Meetings
5.
1. Start Implementation
2. Establish follow-up meeting schedule
3. Quarterly/Semi-annual review meetings

Some of our industry partners

Fund Dealer:

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