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PRIVATE WEALTH

NEW CLIENT PROCESS

What to Expect

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The Basics

STEP ONE

Intro Call With John

STEP TWO

Discovery Meeting

STEP THREE

Plan Presentation

STEP FOUR

Sleep On It

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THE FIRST FOUR STEPS

STEP #1: INTRO CALL WITH JOHN

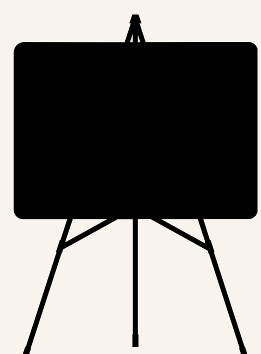
Before committing your time or ours, this 20-minute phone call will give us both a chance to make sure your situation matches our expertise. We want to get a vision of your intentions, challenges, and opportunities unique to your situation and circumstance.

STEP #2: DISCOVERY MEETING

The answers you've provided from our intro call will help guide our analysis, which will result in plain-English answers to your critical questions. We will apply a combined 35 years of experience, thousands of hours of training, studying, and mentoring by the profession's top experts and expertise as a CFP professional to answer the financial questions and concerns you've identified and outlined for us in Step One.

STEP #3: PLAN PRESENTATION

During this meeting we will explain what you need to do to manage wealth to support the life you deserve. Through these recommendations and with our guidance you will see at a high level how our firm can work toward improving your finances and assist you in managing and preserving your wealth.



STEP #4: SLEEP ON IT

After better than 35 combined years in this profession we are in no rush for clients to make a hasty decision. Prior to deciding if we should work together, ask yourself...

1.Do I like/trust/respect John? 2.Will the benefits they provide me exceed the cost? 3.Do the recommendations make sense to me?

If these are a "yes" then on our Monday morning call, let's talk about next steps!

D I S C L A I M E R

While we would love to work with you, if you get to any point in the process and decide it's not a good fit, we will wish you all the best!

Translation: There will never be any pressure. That's not the experience I would want for my family either.

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NEW CLIENT YEARLY CALENDAR

MONTHS *one to two*

- **Cash Flow Planning**
- **Portfolio Allocation**

Equity, fixed-income and alternative investments is a non-inclusive list of investment avenues we will use to align your dollars with your investment goals and time horizon.

MONTHS *three to four*

- **Prior Year Tax Review**
- **Review/Rebalance Portfolio**

Tax reviews can uncover errors, correction or discrepancies in your favor, such as deduction or credits that you were entitled to but didn’t claim on your return. Afterall, it’s not what you make but what you keep!

MONTHS *five to six*

- **Insurance Consultation**
- **Semi-Annual Review With Your CFP**

In this meeting we will review the last 6 month’s cash flow management along with investment performance to see the progress you’ve made since we’ve started working together.

NEW CLIENT YEARLY CALENDAR

MONTHS *seven to eight*

- **Cash Flow Planning Consultations**
- **Review/Re-balance Portfolio**

Quarterly rebalancing and review of your portfolio is essential to maintain asset allocation and portfolio efficiency by attempting to reduce volatility while maintain potential for growth.

MONTHS *nine to ten*

- **Estate Planning Consultation**
- **Roth Conversion Strategy**

Estate planning is critical and often an overlooked aspect of personal financial management. Your healthcare wishes, minimizing family conflict, incapacity and probate are just a few areas that need to be addressed.

MONTHS *eleven to twelve*

- **Review/Re-Balance your Portfolio**
- **Semi-Annual Review with Your CFP**

An end of year review is a valuable practice for individuals to assess their financial health and make informed decisions for the upcoming year. Income assessment, expense analysis, are just a few topics to touch on.

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Mon-Fri: 8:00 AM – 5:00 PM