



Introductory Meeting

YOU

US

- Sign agreement
- Set up payments
- Input info securely online
- Provide supporting documents

- Digest info provided

- Get to know each other
- What do you hope to achieve?
- How can we help & what to expect?

Data Gathering Meeting

YOU

US

- Be available to answer additional questions

- Establish base line plan according to agreed upon scenario
- Conduct additional analysis as needed

- Dig deeper into your "Why?"
- Clarify info provided
- Make sure we are on the same page on what you want to focus on initially

Planning Strategy Meeting

YOU

US

- Confirm initial results
- Provide feedback on action timeline
- Implement recommendations

- Make changes as needed
- Make planning results available online
- Set up action calendar

- Present strategies to meet your goals
- Explain rationale behind initial recommendations
- Get your feedback and be on the same page

Ongoing Communication

- Provide implementation assistance
- Answer any questions
- Monitor your progress & provide further assistance
- Continuous planning as your life evolves