

## **EXPLORATORY** CALL

Assess whether we are potentially a mutual fit

# INFORMATION GATHERING CALL(S)

Collect financial data

### DISCOVERY MEETING

Gain a deep understanding of your goals, concerns and values

## INITIAL FINDINGS MEETING

Presentation of preliminary financial assessment

### MUTUAL COMMITMENT MEETING

Presentation of investment plan and review of account transfer process

## MEETING Presentation of

Presentation of finalized advanced planning recommendations

**IMPLEMENTATION** 

## REGULAR PROGRESS MEETING

Progress review and continued implementation

## INITIAL FINDINGS DOCUMENT

Summary of observations and potential opportunities

### INVESTMENT PLAN

Complete summary of our investment philosophy, process and recommendations

## THE ADVANCED PLAN

Finalized evaluation of your entire financial picture with suitable recommendations

#### THE PROFESSIONAL NETWORK

Team of carefully selected professionals, each with a high level of knowledge and skill in key financial or legal areas

### **PROFESSIONAL NETWORK MEETING**

Our team of specialists applies its expertise to evaluate all aspects of your financial situation and devises appropriate solutions