

FINANCIAL STRATEGY GUIDE PROCESS

If you work with me, what will the process look like?

Initial Planning

This process features three to four meetings generally over 2 months. All meetings are held via videoconference.

Intro Call: Are We a Good Fit?

To have a great financial planning experience requires a few things: we must like each other, we must trust each other, and more importantly the value provided needs to exceed your investment. The choice will also need to be mutual. I have capacity limits for both how many clients I can bring on in a month, as well as, a maximum number of clients. Within my capacity limits I want to be able to work with clients that I will add the most value and that I enjoy working with.

By the end of the meeting: We will have a better idea if I'm the advisor that will help guide you through the financial stress you are currently facing. If I am, you will be provided a clear breakdown of the cost following our meeting. If not, I have a wide range of colleagues that may be a better fit.

Meeting #1: Discuss Values & Possibilities

Most of my clients are extremely busy and don't often have time to reflect on what is most important to them in life.

Through a Mind Map exercise, we will not only take time to reflect on your future opportunities, but also will look back at past money experiences and talk through how this impacts your unique perspective on your finances.

If you had a magic wand, what would your perfect life look like? Dream big and don't hold back. It may be very specific or vague, but it will be a starting point for your "why." Don't let finances be a constraint, we'll acknowledge the financial stuff in the next meeting.

By the end of the meeting: You will likely have a deeper understanding of how your past experiences play a significant role in your relationship with money. If you are a couple, then that understanding is magnified, as you will gain a new appreciation for some of those unique money habits of each other.

What I need from you: This is a casual-conversation meeting. There is no right or wrong answers and you don't need to prepare in advance. You will have to be willing to share openly to get the most value out of this initial meeting.

Meeting #2: Getting Organized

One of the reasons you may have reached out to me is because your financial life became complicated. Sometimes that means you have old retirement accounts here, there, and everywhere; you are unsure which employer benefits to choose, and things just seem chaotic. In this meeting we'll work together to hunt down all the current pieces of your financial life and enter them into your own personal financial management hub.

Remember that magic wand question? Here we will attempt to assign dollar values if they apply.

"TAKE YOUR FINANCIAL CONFIDENCE TO THE NEXT LEVEL!"

By the end of the meeting: This will likely be the first time you see your whole financial picture in one place. This can be a very empowering moment because this is the point where we will begin to measure your progress. You will have your own financial hub, which you can utilize to track your progress on all of your important goals.

What I need from you: Prior to this meeting I will send out an email with a checklist of financially relevant information: login credentials & financial statements. I will also provide a link to your personal finance hub where you can securely upload your sensitive documents.

Meeting #3: Plan Presentation (2 weeks prep needed)

You will receive an initial draft of your Financial Strategy Guide. Included in your strategy guide are the following: Defined Goals, Net Worth Snapshot, SWPT Analysis (Strength, Weakness, Possibilities, Threats), and Specific Recommendations.

This plan will also include a summary cover page that summarizes the highlights of the plan for quick reference.

By the end of the meeting: You will have a clear description of where you are currently, your target goals, and the actions needed to achieve your goals.

What I need from you: Feedback. If the plan misrepresents the direction you hope to go, or you have questions about my interpretation of our previous discussions, please let me know.

Ongoing Planning

6-Week Check-In

Although you may have not been able to implement every recommendation, this is a good check in time to see how things are coming along.

Quarterly Check-In Meetings

The first year it will be important for us to have regular check ins to make sure everything is running smoothly. Future years we will transition to two biannual meetings.

Throughout the Year

We have our normally scheduled meetings, but sometimes life events don't occur on a schedule. I'm available throughout the year on call, by e-mail, or full blown impromptu meetings.

What You Can Expect from Me

My role is to provide you unbiased advice that is highly specific to your unique situation. Not only should I help simplify your financial life, but I should also help you build a plan that empowers you to take action in achieving your goals.

What I Expect of You

The financial planning process is very collaborative, and I encourage you to ask questions freely and share openly.

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