

## MEETINGS



## DELIVERABLES



### Discovery Meeting

Complete discovery process

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### The Wealth Management Plan

Our team understands your goals and builds a detailed plan for all aspects of your financial life.



### Investment Plan Meeting

Presentation of investment plan

2



### Mutual Commitment Meeting

Confirmation of commitment

3

### Asset Transition & Investment Plan

We build a roadmap for your investments moving forward.



### 45-Day Follow-Up Meeting

Organization of account paperwork

4

### Ongoing Review

We meet regularly to review your investments and progress towards goals and refine your plan based on life events.



### Regular Process Meetings

Review of progress and implementation of wealth management plan

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