OUR PROCESS

INTRODUCTORY MEETING: GETTING STARTED

Objective: Get to know our Firm and determine if we're a good fit to help you accomplish your goals.

- Fill out New Client Onboarding forms
- Upload personal documents.
- Create Login for Orion Planning and link outside accounts

MEETING 1: FACT FINDING & GOAL SETTING

Objective: During this meeting we'll work together to develop a clear picture of what work you've done already and what you're looking to achieve .

- In-depth Fact Finding
- Review existing Accounts
- Review Budget and Cash Flow
- Goal setting

MEETING 2: FINANCIAL PLANNING & IMPLEMENTATION

Objective: We will review and customize a plan of action, including a timeline to make your goals a reality.

- Review of existing plans and probability of success
- Discuss Preliminary Financial Plan and recommendations
    - What accounts need to be opened or consolidated
    - How to fund accounts and in what order
- Assignment of Tasks and timeline for implementation

MEETING 3: RECAP

Objective: Our goal is that our clients walk out of this meeting feeling organized and confident in the plans we are working towards.

- Review of Account(s)
    - Confirm all accounts were opened and that beneficiaries are correctly established
- Get updates and a timeline on any outstanding items
- Get Access (Orion, Fidelity/ Schwab)
    - Review how to login and access all of your accounts and tax forms online
- Schedule optional follow up time for any remaining items

ONGOING: MAINTAINING THE PLAN

Objective: Even the best laid plans need updating and ongoing maintenance. We will discuss any important changes and update your goals and plan as needed.

- Based on your needs and complexity, we will arrange either an annual or Semi- annual meeting to maintain your plan.