



Each of my client engagements begin with the below five meetings, conducted in-person or by video call. Our ongoing communication will be collaborative and allow for flexibility based on your goals and priorities.

	Explore Complimentary	Engage Meeting 1	Envision Meeting 2	Enlighten Meeting 3	Empower Meeting 4
Objectives	<ul style="list-style-type: none"> <li>Establish relationship</li> <li>Learn about your main needs, concerns, aspirations, &amp; transitions to plan for</li> <li>Review basic financial information</li> <li>Discuss True Wealth™ Financial Life Planning Process</li> <li>Evaluate fit, estimate scope of engagement, and discuss next steps</li> </ul>	<ul style="list-style-type: none"> <li>Establish your "Point A" - where you are now</li> <li>Understand your perspective &amp; preferences</li> <li>Identify what's most important to you &amp; clarify your priorities</li> <li>Learn what activities and endeavors bring you joy</li> <li>Review financial information</li> </ul>	<ul style="list-style-type: none"> <li>Define your "Point B" - a vision of your ideal life</li> <li>Identify &amp; prioritize personal &amp; financial goals that are meaningful and purposeful</li> <li>Establish a spending plan that aligns with your values, priorities, and vision of your ideal life</li> </ul>	<ul style="list-style-type: none"> <li>Summarize &amp; clarify knowledge of your circumstances &amp; desires</li> <li>Present draft of recommendations covering all aspects of financial life and which support life vision</li> <li>Explain how financial analysis &amp; risk assessment influenced recommendations</li> <li>Discuss scenarios &amp; adjustments</li> </ul>	<ul style="list-style-type: none"> <li>Present recommendations</li> <li>Discuss options for implementation &amp; monitoring</li> <li>Discuss strategies for maintaining focus on goals &amp; priorities and proactively planning for future transitions</li> <li>Identify True Wealth™ Plan Action Steps</li> </ul>
Results	<ul style="list-style-type: none"> <li>Provide meeting summary, proposed financial planning fee, and engagement agreement should you choose to move forward</li> </ul>	<ul style="list-style-type: none"> <li>Provide a list of missing financial information</li> <li>Begin to organize &amp; enter financial information into planning software and begin analysis based on preferences and priorities discussed</li> </ul>	<ul style="list-style-type: none"> <li>Create a cash flow plan that allocates resources towards goals identified</li> <li>Update planning software with goals</li> <li>Complete financial analysis considering preferences, values, priorities, goals, &amp; vision of ideal future</li> </ul>	<ul style="list-style-type: none"> <li>Make any adjustments and, if needed, run second analysis report</li> <li>Create final draft of recommendations</li> </ul>	<ul style="list-style-type: none"> <li>Present Key Elements: a one-page summary including vision of ideal future, key values, transitions, concerns and goals</li> <li>Deliver Completed True Wealth™ Plan Action Steps &amp; Plan for Success</li> </ul>