

True Wealth™ Financial Life Planning

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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	 Establish relationship Learn about your main needs, concerns, aspirations, & transitions to plan for Review basic financial information Discuss True Wealth™ Financial Life Planning Process Evaluate fit, estimate scope of engagement, and discuss next steps 	 Establish your "Point A" where you are now Understand your perspective & preferences Identify what's most important to you & clarify your priorities Learn what activities and endeavors bring you joy Review financial information 	 Define your "Point B" - a vision of your ideal life Identify & prioritize personal & financial goals that are meaningful and purposeful Establish a spending plan that aligns with your values, priorities, and vision of your ideal life 	 Summarize & clarify knowledge of your circumstances & desires Present draft of recommendations covering all aspects of financial life and which support life vision Explain how financial analysis & risk assessment influenced recommendations Discuss scenarios & adjustments 	 Present recommendations Discuss options for implementation & monitoring Discuss strategies for maintaining focus on goals & priorities and proactively planning for future transitions Identify True WealthTM Plan Action Steps
Results	Provide meeting summary, proposed financial planning fee, and engagement agreement should you choose to move forward	 Provide a list of missing financial information Begin to organize & enter financial information into planning software and begin analysis based on preferences and priorities discussed 	 Create a cash flow plan that allocates resources towards goals identified Update planning software with goals Complete financial analysis considering preferences, values, priorities, goals, & vision of ideal future 	 Make any adjustments and, if needed, run second analysis report Create final draft of recommendations 	 Present Key Elements: a one-page summary including vision of ideal future, key values, transitions, concerns and goals Deliver Completed True Wealth™ Plan Action Steps & Plan for Success

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