



1. **Discovery Meeting.** At our initial meeting, we conduct a discovery interview. This helps us identify the challenges you face in achieving all that is important to you. We examine your current situation, the goals you would like to achieve and how we can maximize the possibility of achieving those goals.
2. **Investment Plan Meeting.** At this meeting, we present our diagnostic of your current situation and our recommendations for how we can bridge the gaps in order for you to reach your goals. This plan forms the foundation for all of our work together.
3. **Mutual Commitment Meeting.** At this meeting, we are ready to make a mutual decision about whether our firm can add substantial value and whether we should proceed. Should we both choose to work together, we commit to each other to work toward achieving everything that is important to you and your family. We also execute the documents necessary to put your investment plan into motion.
4. **45-Day Follow-Up Meeting.** When you have multiple investment accounts, it's easy to become overwhelmed with the amount of paperwork you receive. At this meeting, we help you organize all that paperwork in a notebook that we provide. We also answer any questions you may have so that you understand exactly what is happening with your money.
5. **Regular Progress Meetings.** These meetings, which we schedule at intervals convenient to you, provide us an opportunity to review any major changes in your personal or financial situation since our last meeting. If these changes mean that we need to make adjustments to your investment plan, we do so. We also review your overall progress toward your long-term financial goals. This meeting is also our opportunity to implement wealth management solutions that may be appropriate for your situation. We will present to you our financial plan at our first Regular Progress meeting so that we can prioritize those areas of greatest importance to you and then begin to address them systematically.