

Guiding You to a Brighter Financial Future

Phase One: Creating your Financial Blueprint

Advisor Actions / Responsibilities

Financial Planning Sequence

Client Actions / Responsibilities



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Phase Two: Plan Maintenance and Follow - Up

Step 8: Plan Maintenance and Follow - Up

Hourly Continuing Client Program

- You call whenever you wish to re-engage us. We encourage you to call whenever you have a change in your personal circumstances, when market conditions change, or when you think a more frequent consultation would be beneficial. You may also wish to retain us to address another aspect of your financial situation.
- We will also be proactive in reminding you to schedule periodic reviews. Many clients like to come in for an update visit once or twice a year.
- Once we remind you that you are due for a review, you are responsible for calling to set it up.
- We meet at these set intervals to review and monitor your plan and/or investment portfolio and make adjustments as needed.