

# ONBOARDING PROCESS



Plan Foundations (6 to 8 weeks) → Ongoing Services →

<b>45 Minutes</b>	<b>90 Minutes</b>	<b>60 Minutes</b>	<b>60 Minutes</b>	<b>Quarterly</b>
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In this complimentary meeting we will get to know each other, assess a mutual fit, and share about our firm model, pricing, and next steps.

We will identify any missing information while helping you sort through your financial life and get organized. We will discuss your short and long-term goals and begin drafting your household cash flow.

We will analyze and evaluate your current financial status together using our financial planning software. Using these initial findings, we will refine the assumptions based on your goals and values.

During the plan meeting(s) we will review the financial planning recommendations. Generally covering up to 2 topics maximum, the aim is to keep each meeting under an hour.

For those that choose to extend the relationship, we will cover some initial recommendations in the Tailored Plan Meeting, then move into other planning areas and monitor progress as part of Ongoing Services.

**Heavy lift period (2-4 weeks)**

- Docusign
- Data entry in RightCapital
- Organize documents