

Comprehensive Financial Planning Process



Step 1: We agree to work together.

Step 2: We pick a date for our initial onboarding meeting. You pay the initial fee (\$1,000 to \$2,000) and upload the most recent version of each of the following documents (if applicable to your situation) into the secure shared folder *at least one week prior to that meeting*.

- 2 pay stubs
- Employee benefits statement
- Tax return
- Retirement account statements (IRAs, 401k, 403b, 457, pension)
- Other investment account statements
- Employee stock option (ESO)/restricted stock unit (RSU) information
- Checking and savings account statements
- Mortgage statement
- Student loan statement
- Auto loan statement
- Credit card statements
- Any other debt statements
- Life insurance policies
- Disability insurance policies
- Long-term care insurance policies
- Homeowners and vehicle insurance policies
- Wills, trusts, powers of attorney
- Any other relevant financial documents
- Planning questionnaire

Step 3: First 3 Meetings (60 minutes each) over a 6-8 week period

- Clarification questions related to financial documents
- Identification of values, goals, concerns, and priorities for the financial planning relationship
- Preparation and delivery of financial plan

Step 4: Ongoing Planning and meetings

- Meet once a quarter (or as needed based on life events) for 1-2 hours
- Planner and clients will have action steps to complete between meetings
- Cost is \$175-\$300 per month, based on complexity

