WHAT YOU CAN EXPECT FROM US

Fit Meeting	Portfolio and Financial Planning Review	Beginning our Relationship	Wealth Management	Ongoing Review
Getting to know the members of the TLS team. Discussion of our investment philosophy. In depth understanding of your personal situation and determine if there is a good fit.	Discuss and set expectations, review our investment process discussed earlier and reaffirm commitment to your investment policy.	Signing of new account paperwork and forms needed to transfer your accounts, followed by a series of communications introducing you to our team.	Review your personalized comprehensive financial plan; reassess and reprioritize your goals if necessary.	**Annual Reviews** Review investments and recommend adjustments, track your financial planning progress and timely discussions to help mitigate your tax burden.
Day 1	*Within 30 days*	*Within 45 days*	*Within 90 days*	*Ongoing*
WHY WE DO IT: Our intention is to build long term relationships with our clients and families. We start by discovering if there is a good fit.	**WHY WE DO IT:** This meeting provides an opportunity to follow up, calibrate and reaffirm our commitment to the plan we developed together.	**WHY WE DO IT:** Start off our relationship on the right foot, set goals and set expectations for meetings in the coming year.	**WHY WE DO IT:** Introduce you to our GPM technology which assists us in tracking your personalized financial goals.	**WHY WE DO IT:** Oversee progress and reprioritize goals when necessary to keep moving forward as planned.

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Please note, changes in tax laws or regulations may occur at any time and could substantially impact your situation. You should discuss any tax or legal matters with the appropriate professional. Investment products are: not deposits, not FDIC/NCUA insured, not insured by any government agency, not bank guaranteed, subject to risk and may lose value.
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