

Client Engagement Process

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PLANNING 45 DAY **MUTUAL DISCOVERY MEETING FOLLOW-UP** COMMITMENT **MEETING** Explore plan and Review accounts Confirmation of financial options and allocations commitment and account paperwork PRELIMINARY PLAN Evaluate range of estate and investment needs **ADVANCED REGULAR PROCESS PROFESSIONAL PLANNING** & CLIENT **NFTWORK** Investment strategy, estate Select tax, estate, legal & **DISCOVERY** plans and professional business professionals to **MEETINGS** network orchestration contribute to plan