FIRESIDE
FINANCIAL

Relationship Roadmap

Introduction Meeting

- How can we help?
- Who is Fireside Financial and who do we work best with?
- What makes Fireside Financial different?
- Setting expectations moving forward
- Gather contact information

1

Understand & Design

(WITHIN 2 WEEKS OF THE INTRODUCTION MEETING)

- Gather additional personal information.
- What are your expectations of me as your client?
- Please help me to make sense of my investments.

2

Implement

(2-3 WEEKS AFTER STEP 1, AFTER ASSETS ARE TRANSFERRED)

- How do I feel about investment risk?
- How does my investment risk effect my rate of return?
- How do taxes affect my investment accounts differently?

3

Goals Review

(3-4 WEEKS AFTER STEP 2, AFTER PROVIDING INFO FROM THE FINANCIAL GOALS CHECKLIST)

- Am I doing enough now to reach my goals later?
- What changes do I need to make (if any) to accomplish my goals?

4

Financial Foundations

(6-8 WEEKS AFTER STEP 3)

- What if something happens to me or my family before I reach my goals?
- Financially, will my family be okay if something unexpected happens to me?
- What happens to everything that I leave behind to my family?

5

Supervise

(8-10 WEEKS AFTER STEP 4)

- How are we doing so far now that we've made changes?
- Do we need to make any more changes?

6

Confirming & Setting Expectations

(10-12 WEEKS AFTER STEP 5)

- How often are we going to communicate going forward?

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