

Welcome Aboard: Our Process and What You Can Expect

Day 1: Beginning Our Relationship

Signing of new account paperwork and forms needed for transferring your accounts, followed by a series of communications introducing you to our office and Raymond James.

WHY WE DO IT: Start off our relationships on the right foot, set goals, and schedule meetings for the coming year.

Within 45 days: Service Commitment Meeting

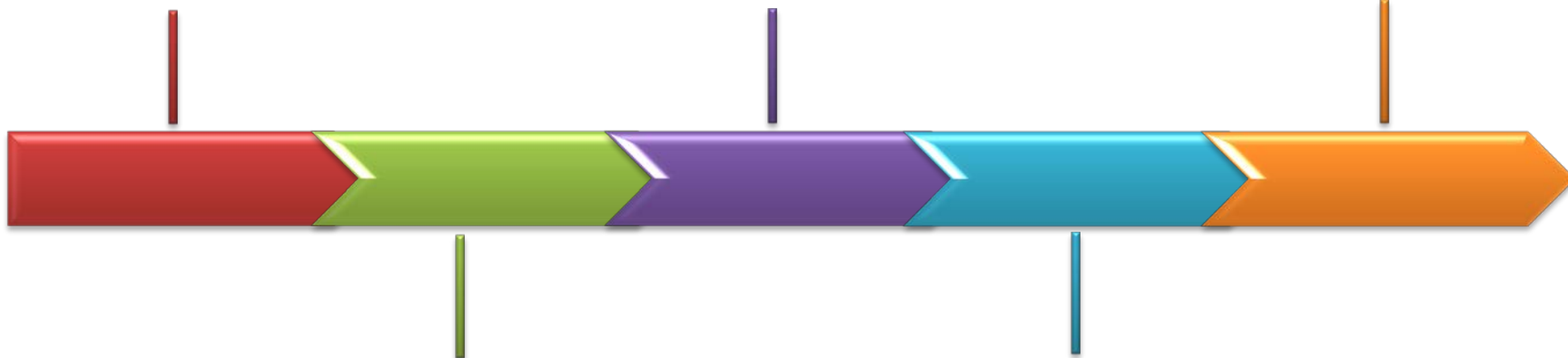
Walk through services, including online access and cash management tools; set up statement and communication preferences.

WHY WE DO IT: Ensure the service we deliver is in line with your expectations and serves your needs as best possible.

Ongoing: Regular Process Meetings

Annual Reviews - Review investments and financial plan; assess progress and recommend adjustments
Year-End Planning – Timely planning to help mitigate tax burden.

WHY WE DO IT: Monitor progress and reprioritize goals when necessary to keep moving forward as planned.



Within 30 days: Investment Process & Policy Review Meeting

Discuss and set expectations, review our investment process discussed earlier and reaffirm commitment to your investment policy.

WHY WE DO IT: Everyone listens differently when receiving new information. This meeting provides an opportunity to follow up, calibrate and reaffirm our commitment to the plan we developed together.

Within 90 days: Wealth Management Plan Meeting

Review your personalized, comprehensive financial plan; reassess and prioritize your goals if necessary.

WHY WE DO IT: Set a schedule for the coming months to make sure all open items are addressed in a timely manner.