WELCOME ON BOARD.

Our personalized client on-boarding process provides a strong foundation for establishing our long-term professional relationship. We invest the time to help ensure all bases are covered, all details are addressed and all parties are on the same page.

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.

Day 1

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

Investment Process & Policy Review Meeting

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

Within 30 days

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.

Service Commitment Meeting

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

Within 45 days

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

Wealth Management Plan Meeting

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

Within 90 days

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

Regular Progress Meetings

Annual Reviews
Review investments and financial plan; assess progress and recommend adjustments.

Year-End Planning
Timely planning to help mitigate your tax burden.

Ongoing

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

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WEALTH MANAGEMENT

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