WELCOME

Our personalized process for welcoming new clients 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	Investment Process & Policy Review Meeting	Service Commitment Meeting	Wealth Management Plan Meeting	Regular Progress Meetings
Learn about you, your personal and financial objectives, define goals, set expectations for investment policy and planning scope. Followed by a series of communications welcoming you to KWM.	Review our investment process discussed earlier and reaffirm commitment to your investment policy.	Walk through services, including online access and cash management tools; set up statement and communications preferences.	Review your personalized, comprehensive financial plan; reassess and re-prioritize your goals if necessary.	**Annual Reviews** Review investments and financial plan; assess progress and recommend adjustments. **Year-End Planning** Timely planning to help mitigate your tax burden.
Day 1	*Within 30 days*	*Within 45 days*	*Within 90 days*	*Ongoing*
WHY WE DO IT: Start off our relationships on the right foot, set goals, and schedule meetings for the coming year.	**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.	**WHY WE DO IT:** Ensure the service we deliver is in line with your expectations and serves your needs as best as possible.	**WHY WE DO IT:** Set a schedule for the coming months to make sure all open items are addressed in a timely manner.	**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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