Financial Planning Clients Can Expect the Following Process

- ✓ Establish Planner / Client Relationship
  - Clarify the business relationship
  - Determine expectations and responsibilities
  - Provide regulatory disclosures
  - Agree on fees and payment structure
  - Sign a contract of understanding
- ✓ Gather Information
  - Set Goals and Timelines
  - Use PreciseFP and Interviews to gather relevant information
- ✓ Dan Analyzes & Develops Recommendations
  - Dan goes to work to identify vulnerabilities and action plans to reach aforementioned goals
  - Dan will follow-up if more information is needed
  - Dan may consult other trusted experts to learn more about certain subjects
- ✓ Meet to Go Over Recommendations and Agree on Plan
  - Present Action Plan and get feedback from client
- ✓ Implement Strategies
  - Define responsibilities and timelines to accomplish goals
  - Schedule follow-up meetings if necessary
- ✓ Monitor
  - Review progress and provide encouragement to accomplish goals
  - Tweak plan if necessary

Well-Rounded Success
Financial Planning Topics

Work with Dan to create a plan to tackle these topics in the Well-Rounded Financial Planning Model

Bedrock

Cash Flow Management
Emergency Savings
Basic Insurance
Health Savings
Retirement Planning
Investments
Credit, Loans, & Debt
Automatic Saving

Community

Taxes
Charitable Giving
Estate Planning

Career

Career Development
Income Planning
Employee Benefits
Continuing Education
Investing in Yourself

Relationships

Beneficiaries
P.O.D. & T.O.D.
Estate Planning
College Savings
Life Insurance
Advance Directives
Will & Probate
Aging Loved Ones
Legacy Planning

Soul

Fun Money
Psychology with Money
Vacations
Hobbies
Financial Goals
Life Stages

www.wellroundedsuccess.com