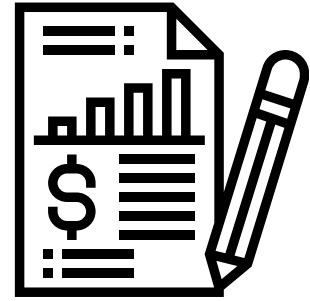


## Intake

- Goals and Objectives
- Financial Documents
- Paperwork
- Payment

MEETING  
**#1**



MEETING  
**#2**

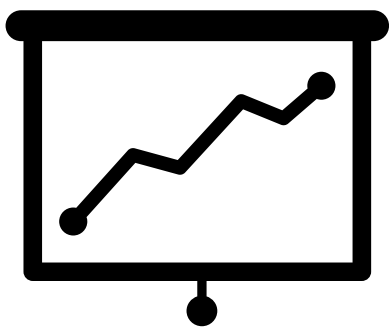
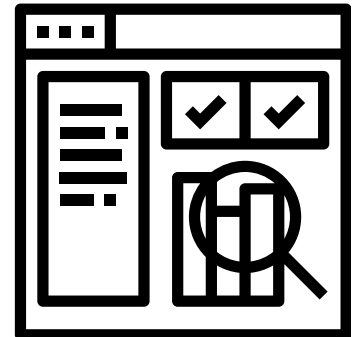
## Fact Finding

Our team gathers all relevant materials

## Connections

Connect financial accounts to financial plan account

MEETING  
**#3**



MEETING  
**#4**

Analysis &  
Revision Planning

## Plan Presentation & Implementation

MEETING  
**#5**