THE Income to Wealth **Blueprint**

Every step of the way

DISCOVERY MEETING

Complete Discovery Process Addressing Goals and Concerns

- Protection Review
- Savings Review (Retirement & Education)
- Growth Review (Brokerage Accounts)
- Real Estate Review
- Cash Flow & Debt Review
- Legacy Review

PORTFOLIO REVIEW & VERBAL COMMITMENT MEETING

Diagnostic of Current Portfolio

- Protection Analysis
- Savings Analysis
- Growth Analysis (Risk & Cost Analysis)
- Identify Inefficient Money (Cash Flow & Debt Analysis)
- Legacy Analysis

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Move Forward
Verbal Commitment

PLAN REVIEW & ONBOARDING MEETING

Integrating your Income to Wealth Building Blueprint

- Protection Plan
- Savings Plan
- Growth Plan
- Real Estate Plan
- Redirect Inefficient Money (Cash Flow & Debt Plan)
- Legacy Plan

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Sign Client Agreement
Open Accounts

CLIENT EXPERIENCE IMPLEMENTATION MEETING

Reiterate Expectations and Structure of Your Plan

- Review Accounts
- Review Initial Statements And Website
- Establish Regular Review Process
- Implement Advanced Planning

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