

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



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



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