**Introductory Meeting**

**YOU**
- Sign agreement
- Set up payments
- Input info securely online
- Provide supporting documents

**US**
- Digest info provided

**Data Gathering Meeting**

**YOU**
- Be available to answer additional questions

**US**
- Establish base line plan according to agreed upon scenario
- Conduct additional analysis as needed

**Planning Strategy Meeting**

**YOU**
- Confirm initial results
- Provide feedback on action timeline
- Implement recommendations

**US**
- Make changes as needed
- Make planning results available online
- Set up action calendar

**Ongoing Communication**

- Get to know each other
- What do you hope to achieve?
- How can we help & what to expect?
- Dig deeper into your “Why?”
- Clarify info provided
- Make sure we are on the same page on what you want to focus on initially
- Present strategies to meet your goals
- Explain rationale behind initial recommendations
- Get your feedback and be on the same page
- Provide implementation assistance
- Answer any questions
- Monitor your progress & provide further assistance
- Continuous planning as your life evolves

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