

CLIENT TIMELINE



GETTING STARTED

Review the contracts & understand expectation of relationship

30-60 minutes

After all documents are received we will reach out to schedule Alignment



ALIGNMENT

Learn our approach & develop a mix of investments for you

30 minutes
*(90 minutes for
Rebellionaires®)*



DISCOVERY

Talk about your individual values and discover your goals

90 minutes

Minimum of 1 week between Discovery & Design



DESIGN

Take a deep dive into your finances while we plan for your dreams

90 minutes

Minimum of 2 weeks between Design & Implementation



IMPLEMENTATION

Understand your Custom Financial Blueprint®

90 minutes

1 to 2 weeks between Implementation & Follow Through



FOLLOW THROUGH & SUPPORT

We'll call you to see if need support

15 minutes

First Quarterly Report (Jan, Apr, Jun, or Oct.) generated before Tailoring



TAILORING

Review your first quarterly report

30 minutes

6 months between Tailoring & first Biannual Review

BIANNUAL REVIEWS



ANNUAL INVESTMENT MANAGEMENT REVIEW

60 minutes

6 months before next Biannual Review, repeat Biannual Reviews



ANNUAL FINANCIAL PLANNING REVIEW

90 minutes