

Concept Interview Meeting 1

- Discuss our services
- Discuss your situation
- Discuss fee

Time Involved - Yours: 1 hour
Ours: 1 hour



Engagement Proposal /Fact Finding Meeting 2

- Review Engagement Proposal outlining services to be provided
- Gather appropriate financial data, objectives, and risk tolerances
- Discuss attitudes, views and concerns and establish goals

Time Involved - Yours: 2 hours
Ours: 6 hours



Plan Design Weeks 2-8

- Analyze and summarize current documents as they impact your plan
- Model your current financial status
- Evaluate models based on your goals, objectives and attitudes
- Develop ideas and concepts for your review and feedback
- Begin "What If" modeling
- Develop checklist of design options for your feedback
- Identify primary recommendations
- Clarify and verify data

Time Involved - Ours: 16+ hours

Review and Service

- Analyze ongoing issues
- Make adjustments as your situation changes
- Keep planning updated/current

Time Involved - Yours: 2 hours
Ours: 6 hours



Financial Planning Process



Global Wealth Advisors

Implementation Weeks 13-52

- Balance tax efficiency, asset purchases, and asset preservation with appropriate legal documents
- Coordinate evaluation of multiple company products
- Implement Investment Policy Statement
- Schedule and manage implementation list with your attorney and CPA
- Secure your active good will (Referrals and Introductions)

Time Involved - Yours: 7 hours
Ours: 16+ hours



Plan Presentation Meeting 4

- Review your objectives and observations about your current situation
- Clarify your design ideas
- Evaluate with you your alternatives
- Make specific recommendations
- Deliver written financial plan document
- Establish action plan with timeline

Time Involved - Yours: 2 hours
Ours: 10 hours



Pre-Presentation Meeting 3

- Review preliminary plan
- Make corrections and adjustments
- Discuss general planning concepts

Time Involved - Yours: 1 hour
Ours: 8 hours

