FINANCIAL PLANNING: STEP 1 OF 5

DISCOVERY

WHAT

Collaborative Workshop

WHEN

Day 1

GOALS

- ✓ Get to know you, your interests, and your goals.
- ✓ Identify all the components involved in your financial life.
- ✓ Align on how we will model out your financial future.

HOW TO PREPARE

You don't have to prepare much for this meeting. Simply consider or jot down a few notes around the following:

- Where are you at in life? What are you trying to accomplish?
- What questions or concerns do you have about your current situation?
- What future events do you imagine influencing your financial situation?
- What do you wish you knew more about but are afraid to ask?

DURING YOUR SESSION

This first meeting can be nerve-racking for new clients, but don't worry - we're not here to judge you or your past financial decisions. We're here to learn about you, your priorities, and identify all the components involved in your financial life.

We will use a flexible worksheet questionnaire to accomplish the following:

- Address any open questions you have about our company and process.
- Gain an understanding who you are and what's happening in your life.
- Listen to your priorities and help you set realistic financial goals.
- Identify financial risks and discuss concerns you might have.
- Align on your ideal timeline and educate you on important dates.
- Clarify and discuss opportunities you may have missed.
- Moderate difficult conversations and differences in opinion between partners.
- Identify and consider all the components involved in your financial life.

AFTER THE SESSION

After your Discovery session, you will be asked to collect a variety of information and documentation that will help us better understand the details of your financial situation and accurately model out your potential future scenarios.