entrepreneuraligned

· YOUR SUCCESS SHOULD FEEL SATISFYING ·

Your Roadmap

1. DEEP DISCOVERY – TODAY'S MEETING!

- Ensure we are all clear on what matters most to your family, your values, and your specific financial goals
- Review your current financial structure

2. PROPOSAL

- Review to the proposed roadmap
- Sign the client agreement

3. FIRST QUARTER
Address Your Immediate Needs

- Create forward looking projection of personal cash flows
- Solidify your family vision, values, and goals
- Begin developing an investment and financial plan in support of your vision, values, and goals
- Establish information sharing for CPA/Attorney/CFO/Other Advisors

4. SECOND QUARTER
Business Equity and Investment Planning

- Obtain business valuation
- Develop plan to help ensure Kelly and children are taken care of should something happen to George (Business Estate Planning)
- Finalize investment policy statement and implementation plan

5. THIRD QUARTER
Lending and Estate Planning

- Review borrowing costs and opportunities for lending
- Review legal structure and estate plan

6. FOURTH QUARTER
Risk Management and Tax Planning

- Review any tax projections from CPA and implement any investment tax strategies
- Review insurance coverages (property & casualty, life, and disability)

ONGOING

Each of these areas are proactively reviewed and opportunities are brought to your attention. Will reach out each quarter and you decide whether you want to meet with us or just have us communicate via email or reports to your client vault. Our job is to ensure that that you never miss opportunities and that none of the important things around your financial life ever get missed.

Proposed quarterly fee: $5,000