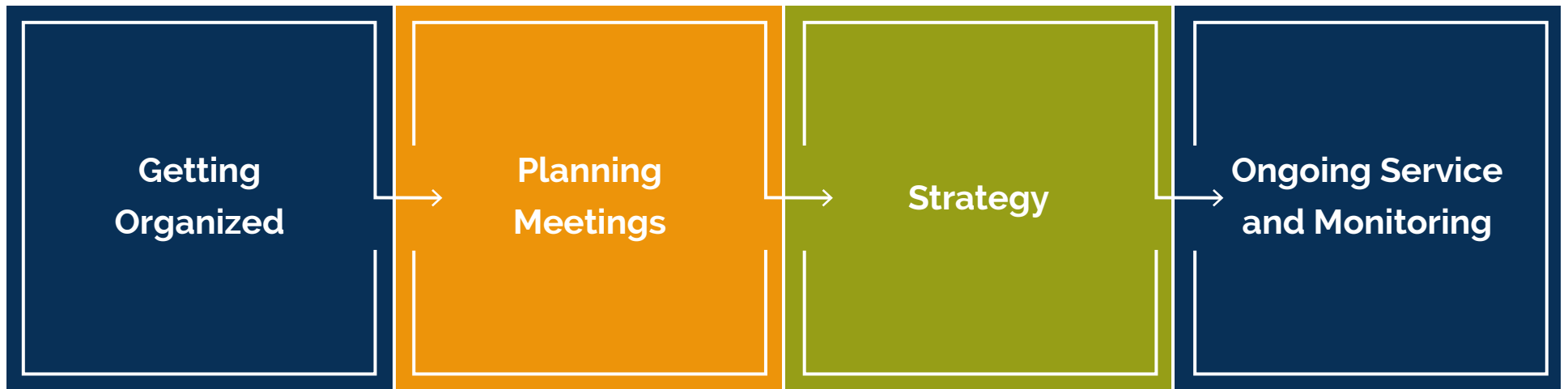


New Client Timeline



As a new client of IPWM, we'll accomplish the following in this step:

- ☑ Pre-populate the necessary documents for you to review and execute
- ☑ Share our data collection tools to begin the financial planning process
- ☑ Hold our "Get Organized" meeting to ensure mutual clarity on all data that you've shared with us as we continue to build out your plan and strategy.

- ☑ Big Why - addressing your chief complaint
- ☑ Practice Financials & Retirement Plan *(if applicable)*
- ☑ Investment, tax, cash flow
- ☑ Insurance, estate planning, succession planning *(if applicable)*

We will work together to help you implement the decisions and strategies we have discussed thus far in the planning process.

After the completion of the process, we shift into review and monitoring mode, ensuring that as variables change, your plan changes with it to help you accomplish the goals we've outlined together.

Planning may take place over a series of up to four meetings, depending on your needs and situation.