START

### START THE CONVERSATION
Book a quick intro call to get to know each other and answer your initial questions.

### DISCOVERY SESSION
We dive into your goals, challenges, and what matters most to you.

### STRATEGY FIT SESSION
Learn how we work and explore if our approach aligns with your needs.

### WELCOME & ONBOARDING
If we're a good fit, we kick off our partnership with onboarding and access to your client portal.

### PLAN LAUNCH & DATA GATHERING
We begin building your dynamic financial plan and collect key info to guide our next steps.

### RISK & ALLOCATION ALIGNMENT
We assess your risk tolerance and ensure your portfolio supports your financial goals.

### TAX STRATEGY REVIEW
Review and optimize your tax situation to strengthen your overall plan.

### ESTATE PLANNING SNAPSHOT
We make sure your legacy and legal documents are in order—no matter your life stage.

### PLAN REVEAL & ROADMAP PRESENTATION
We present your personalized financial strategy and actionable next steps.

### SMART PORTFOLIO CHECKUP
We review all your investment accounts to ensure they're aligned and optimized.

### ONGOING PATH FORWARD
With the foundation in place, we move into execution and proactive support for your evolving life.