Continuum Wealth Management™ Engagement Roadmap

First Year

Getting Acquainted and Focused

- Who are you? / Who are we?
- Goals and objectives / Major life events
- Risk tolerance
- Your personal financial landscape

Financial Picture Review 1

- Personal Financial Management Strategy
- Assets, Income, Liabilities and Expenses
- Investment strategies
- Preliminary investment decisions

Financial Picture Review 2

- Finalize investment decisions
- Where does all the money go?
- Managing your Family Business effectively

Financial Picture Review 3

- Understanding and managing liabilities
- Understanding and managing expenses
- Recommendations

Financial Shelter

- Review and refine major life events
- Wills and Trusts
- Personal Risk Management

Strategic Planning

- Deliver preliminary Continuum
- Review goals and objectives / Major life events
- Develop strategies to meet goals

Presentation of Plan

- Deliver and review final Continuum
- Develop strategy implementation checklist
- Establish review calendar

Coordinate Meetings with Other Advisors as Required