Financial Life Advisors

Let's plan for the life you want to live.

Our 5 step process

Schedule · Engage · Discover · Attend · Implement

	What We Need From You.	What To Expect From Us.
Schedule Initial Consultation	• Pre-consultation worksheet	• Get to know you and identify planning opportunities • Answer questions about Financial Life Advisors • Provide a written quote for services (2 business days)
1 - 10 days		
Engage FLA For Services	• Signed agreement • 50% of planning fee due • Complete your risk assessment and spending plan • Collect and share documents for planning	• We'll gather and analyze data from your documents • We'll contact you weekly with questions and updates
1 - 3 weeks		
Discover Your Goals	• Come with an open mind • Review goals workbook	• We'll ask lots of questions • We'll develop a plan and goal projections
2 - 4 weeks		
Attend Presentation Meeting	• Be ready to ask questions	• We'll review your initial Financial Plan and goal projections • We'll summarize key points and discuss action items
1 - 3 days		
Implement Your Plan	• Wealth Management • Foundational (Remaining 50% of planning fee is due) • Implement plan yourself	• We'll provide a copy of your final Financial Plan • We'll provide copies of our written reports on Income Tax, Investments, Insurance and Estate Planning • We'll outline a prioritized action list