Unrivaled
WEALTH MANAGEMENT

# PROSPECTIVE CLIENT PROCESS

## 1 INTRODUCTORY CALL

***Expected Duration: 20-30 minutes***

**Goals of Meeting**

- Get to know each other
- Learn about your specific situation
- Explain our process and next steps
- Answer any questions you have for us

**End Result**

- If we both feel there could be value in working together, we'll schedule your initial Discovery Meeting
- If either of us feels we aren't the best firm to help you, we'll provide resources or referrals to help you find a better fit.

## 2 DISCOVERY MEETING

***Expected Duration: 45 minutes to an hour***

**Goals of Meeting**

- Discuss your values and what's truly most important to you.
- Create and prioritize meaningful and measurable goals that align your time, money, energy, and attention with the life you want to live.

**End Result**

- Schedule presentation and proposal meeting.

## 3 PRESENTATION & PROPOSAL

***Expected Duration: 45 minutes to an hour***

**Goals of Meeting**

- Present high-level observations of your financial situation and review opportunities for improvement.
- Present a proposal for partnering to implement financial recommendations specific to you and your ideal life.

**End Result**

- Take time to decide on our proposal.
- If we agree to partner, we'll move to client onboarding and plan implementation. If not, we'll share your one-page plan and other resources to help find the right firm for you.

## 4 CLIENT ONBOARDING

- Sign Advisory Client Agreement
- Provide necessary information for Schwab account opening (Investment Management relationships only)
- Begin implementing financial solutions
- Transition to regular client service calendar