7 Steps to Financial Success

STEP 1 - Initial Inquiry

Integrated Financial Planning Solutions Responsibilities:
We provide a brief description of our services, philosophies, planning process and fee structure on our website for you to get to know who we are and how we might assist you.

Client Responsibilities:
If our services appear to fit your needs, you should call to schedule a "Get Acquainted Meeting" that will be conducted in person or on the telephone. This will provide you with an opportunity to ask questions and obtain additional information.

STEP 2 - Get Acquainted Meeting or Teleconference

Our Responsibilities:
We can meet with you in person or via teleconference. It's an opportunity for you to share your needs and objectives with us and to discuss which of our services are right for you, and for us to provide you an estimate of the cost to address your financial planning objective(s). Remember, we do not accept commissions but instead charge for our services on an hourly or project basis. <u>There is no charge for this initial consultation</u>.

Client Responsibilities:
If you choose to use our services, you will need to provide us with preliminary background information that is necessary for us to address your planning needs.

STEP 3 - Data Gathering and Initial Preparation

Our Responsibilities:
After receiving your information, we will initiate an in-depth review and analysis of your situation and prepare your custom financial plan. We will prepare initial reports that will be discussed with you at our next meeting.

Client Responsibilities:
You will need to gather the requested data and typically complete a risk tolerance questionnaire that we will give to you. This information will need to be provided to us before the next meeting.

STEP 4 - Interactive Goal Setting, Risk Tolerance Assessment and Investment Policy Statement preparation

Our Responsibilities:
Depending on your planning objectives and needs, this meeting may or may not be necessary. If a meeting is required, it can be in-person or via teleconference. We will work with you to further discuss and clarify the information you have provided thus far, and to refine your financial goals and objectives.

Client Responsibilities:
This is another opportunity for you to clarify your current situation, financial goals and objectives, and to discuss with us any additional questions and concerns.

STEP 5 - Analysis and Plan Formulation

Our Responsibilities:
We will further analyze and process the information you provide in Step 4 and formulate

planning solutions . We will create final reports that include our observations, plan assumptions, specific recommendations, and an action plan that addresses your planning needs and objectives.

Client Responsibilities:
The ball is clearly in our court. All you have to do at this point is wait until the next meeting with Integrated Financial Planning Solutions.

STEP 6 - Presentation of Your Financial Plan

Our Responsibilities:
We will meet with you to present your personal financial plan and review and explain our specific recommendations.

Client Responsibilities:
Congratulations! You now hold a personal blueprint addressing financial planning solutions to the objectives, goals and concerns that you identified in earlier meetings with us. You are now empowered with guidance and strategies to achieve your financial planning goals. If you wish, you may engage us to assist you in implementing the plan.

STEP 7 - Financial Checkups

Our Responsibilities:
Periodic update meetings and reviews are essential to assure that you remain on track with your plan. We can schedule these periodic meetings with you at whatever frequency you think appropriate.

Client Responsibilities:
Financial planning is a dynamic process, not a one-time event. Proper implementation of a financial plan and periodic reviews are crucial to reaching your financial goals. We want to walk with you on your financial planning journey and view our role as an integral partner in helping you to achieve your planning goals and objectives.

Integrated Financial Planning Solutions, LLC

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