CLIENT ONBOARDING

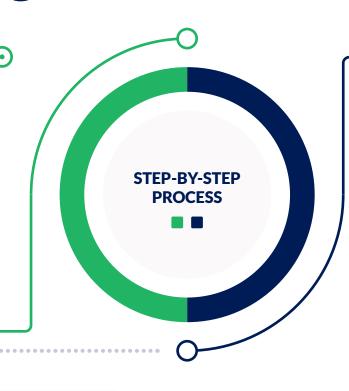


PHASE 01

Onboarding

- 01 Sign RPP Client Agreements
- **02** Onboarding Meeting
- Open Accounts & Transfer (Not Required)
- **04** Investment Policy Statement
- 05 Collect Additional Data &

Documents



PHASE 02

Financial Planning Kickoff

- 01 Financial Plan Kickoff Meeting
- 02 Develop Action Plan
- 03 Establish This Year's Goals
- **04** Financial Plan Review Meeting
- **05** Implement Your IPS



BI-ANNUAL MEETINGS (MAY & OCTOBER)

Bi-annual review meetings allow us to make sure we're doing the best possible job for you throughout the year.



INVESTMENT MANAGEMENT

Evidence-based investment advice tailored to your retirement, risk, and time horizon.



CHARITABLE GIVING

Create a long-term giving plan to accomplish your charitable goals and reduce taxes.

Ongoing Financial Planning

TAX & ESTATE D-M PLANNING

Multi-year planning to lower taxes over the course of your lifetime and ensure you have the right estate documents in place.



INSURANCE PLANNING

Maximize your existing insurance policies and explore additional insurance when necessary.



RETIREMENT PLANNING

Stress test your retirement plan and create a reliable income stream.