CLIENT ONBOARDING

RETIREMENT PORTFOLIO PARTNERS

PHASE 01
Onboarding

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

STEP-BY-STEP PROCESS

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

Ongoing Financial Planning

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.

TAX & ESTATE 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.