NEW CLIENT PROCESS

FIRST TWO MEETINGS ARE ZERO COMMITMENT AND COST *

MEETING 1 - GET TO KNOW YOU

- 60-minute meeting
- See if we're a good fit for you
- Clarify client's needs and goals
- Overview of working with SWP
- Key data gathered
- Agree whether to meet again and review free one-page overview!

*Zero commitment and zero cost

MEETING 2 - PRESENT FREE CLIENT OVERVIEW & DECISION

- 60-minute meeting
- Ideally 2-3 weeks after prior meeting
- Review one-page overview
- Discuss partnering for ongoing planning (service packages, fees, etc.)

*Zero commitment and zero cost

NEW CLIENT ONBOARDING

MEETING 3 - GETTING ORGANIZED

- 60-minute meeting
- Ideally 2-3 weeks after prior meeting
- Tech overview
- Gather all data
- Conduct asset transfers (if investment management desired)

YEAR 1 STRATEGY MEETINGS

- Four to six meetings throughout the year
- Ideally 2-3 weeks after prior meeting
- Review initial detailed financial plan
  - Outline initial action steps
  - Segment additional action items into phases
- Outline touchpoints for the balance of the year one to ensure execution of Year 1 plan

Transition to Ongoing Planning

- After Year 1 planning is completed, clients transition to ongoing planning
- Revised financial plan created each year