01
Discovery Meeting
- Introductions
- Discuss goals/concerns
- Current financial position
- Expectations/Values

02
Summary/Data Gathering
- Email Summary/Homework
- Complete Worksheet
- Compete Client Engagement/Invoice
- Send Regulation Docs/Forms
- Dues 2 weeks later

03
Analysis/Projection Meeting
- Present recommendations or 1st Draft
- Intro to ParaPlanner
- Create Vault/Next Steps

04
Client Intake/Homework
- Complete Intake Form/Homework
- Send Executive Summary
- Gather Statements/W2s/Paystub

05
Financial Planning Meeting
- Review Plan/Recommendations
- Present Risk Illustrations
- Gather additional Info

06
Risk Management
- Apply for Insurances
- Underwriting/Policy review
- Review Savings/Cash Flow
- Debt Management

07
Investor Strategy Meeting
- Investor Profile
- Proposals/Strategies
- Review Current Investments
- Account Opening/Funding
- Docusign

08
Estate/Tax Planning
- Review Tax Strategies
- Review Trust/Important Contacts
- Gather Documents
- Create Will/Directives

09
Implementation Review
- Status Call
- Referral Introductions
- Review Risk and Investment Accounts

10
Final Plan Meeting
- Financial Life Organizer
- Community Engagement
- Intro to eMoney/Vault
- Future Goals
- Schedule Annual Review

SC

SHAYNE CORRIEA FINANCIAL GROUP

Integrity • Trust • Passion