Retirement GUIDEPATH

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If you're ready and willing to roll up your sleeves and do the work it takes to get your retirement right, we want to visit with you! Here's our GuidePath Advantage as a step-by-step guide so you know what to expect when working with us:

MEETING #1

- Spend time getting to know each other. We'll learn a little about what you are hoping to achieve through an engagement with our team.
- Walk through a sample client case using the Retirement Positioning System to show you exactly what you can expect from the Retirement GuidePath planning process.
- We'll talk through how we will care for you after your GuidePath is implemented.
- We'll discuss our cost structure and options that fit with your situation.
- By the end of this meeting, you'll will have the knowledge to decide if moving forward makes sense.
- If we move forward, we'll provide you with a checklist of information to gather and schedule our second meeting.

MEETING #2

- We will review the information you've gathered to clearly understand your current financial situation.
- This meeting will feel similar to a visit to the doctor. We'll ask numerous questions to diagnose any potential opportunities for improvement and to understand your goals, objectives, challenges, and opportunities as they relate to all aspects of the GuidePath process.
- After this meeting, we'll enter the information obtained into the RPS system for analysis and prepare recommendations. We'll also schedule our third meeting.

MEETING #3

- Reaffirm your goals and objectives and discuss anything new or changes to your current goals.
- Review your RPS analysis and recommendations while showing you benefits of asset protection and tax optimization.
- Start executing your personal GuidePath.
- Complete your onboarding paperwork.
- Set expectations for timeframe of initial plan setup.
- Schedule a 60 day follow up meeting.