1

Get to Know You

Meet with Senior Wealth Advisor, Stephen Fletcher, CFP®, MBA.

Complete your Personal Financial Profile and schedule a virtual introductory call so we can learn more about your situation and see if we are a good fit.

2

Get to Know Us

Learn more about BlueSky and schedule your complimentary advisory meeting.

After a successful introductory call, we will provide you with more information about our flat-fee, fee-only approach and our different service models. We will also send you a link to schedule your complimentary meeting with your advisory team.

3

Meet the Team

Things are moving right along.

During your complimentary meeting you will have the opportunity to become more familiar with BlueSky's advisory approach while gaining a more detailed understanding of the value that we can provide to your specific situation.

4

Service Proposal

Receive a personalized plan tailored just for you.

Upon the completion of the Getting Acquainted meeting, your advisory team will create a proposal specifically tailored to you and your situation. You will receive this proposal by email, where you can review the detailed outline of the services that BlueSky will provide and the fee for our services.

5

Welcome to BlueSky

Accept your personalized proposal.

When you have reviewed your proposal and would like to proceed, simply sign the agreement. Your advisory team will be in touch soon!