CCS
CERTIFIED CASH FLOW SPECIALIST™

THE CASH FLOW PLANNING PROCESS ONE MONTH

WEEK 1 | WEEK 2 | WEEK 3 | WEEK 4

OR

DECIDE IF AN INITIAL CONSULT MAKES SENSE

FIRST MEETING
ALL ABOUT YOU
DECIDING NEXT STEPS

SECOND MEETING
INITIAL STRATEGY DISCUSSION

THIRD MEETING
PLAN DELIVERY

Send information at least 48 hours prior.

Letter of engagement signed.

Confirm information.

DISCUSS YOUR CASH FLOW NEEDS

READY TO GET STARTED?

ANY NECESSARY REFERRALS

CHANGE YOUR LIFE!