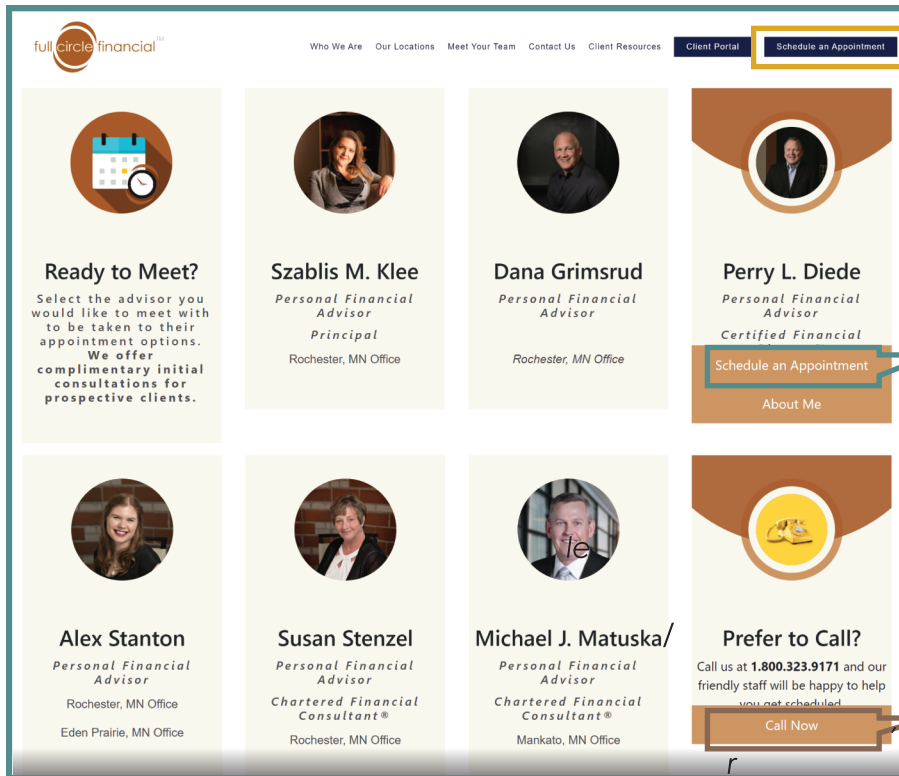


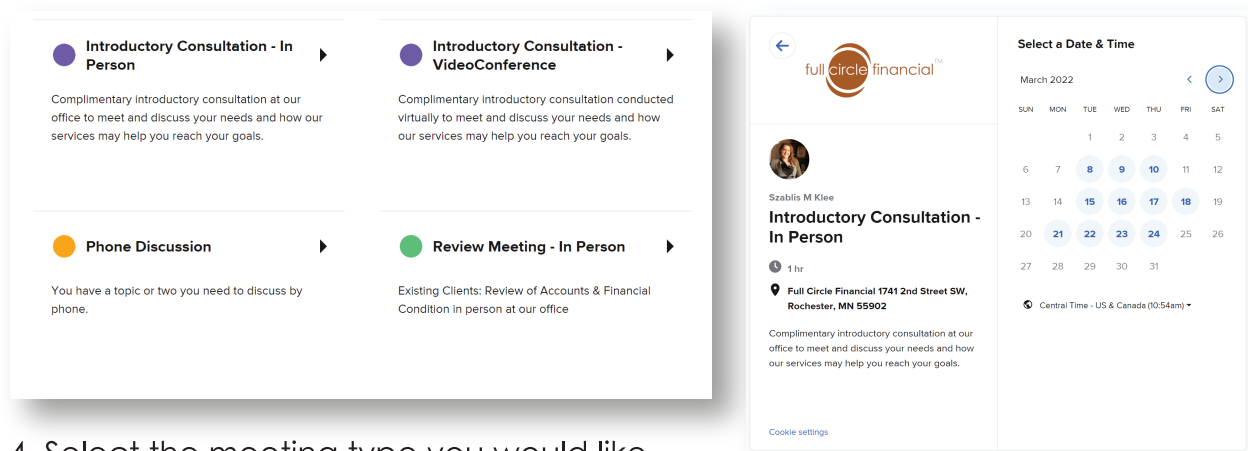
# 1. Head to [www.MakeSmartDecisions.com](http://www.MakeSmartDecisions.com)



**2. Access the Widget**  
Select the "Schedule an Appointment" button at the top of any page on our website.

**3. Select your advisor**  
Select the "Schedule an Appointment" button under the advisor you'd like to meet with.

*Can't find a time that fits?*  
Feel free to call and we will get you directed to the right staff member for scheduling your appointment.



**4. Select the meeting type you would like to schedule from the options that appear.**

**5. Select the date and time you would like to meet from the available times shown.**

**Enter Details**

First Name \*  Last Name \*

Email \*

[Add Guests](#)

What phone number can we reach you at? \*

Please share anything that will help prepare for our meeting. For instance, why are you seeking a financial professional?

How did you hear about us?

[Schedule Event](#)

## 6. Enter your details and fill out the questionnaire for your meeting.

You will receive a confirmation email for your meeting. If you need to cancel, or reschedule your meeting time, this email will also have links to modify your appointment. Otherwise, and for any complications, please give us a call at 1.800.323.9171.