



Meeting Schedule- Year 1

Here is a general meeting schedule for most clients.

Meeting 1- Talking Life

It's about getting to know you and what you're hoping to accomplish in life. We'll be talking through questions like, "How'd you get into your business or career?" and "What would you do if money wasn't an issue?". We'll then talk about a plan to tackle some of these life goals together.

Meeting 2- Getting Organized

Ah, a place for everything and everything in its place! We'll add your financial accounts---such as checking, mortgage, and investments---to your online account at Right Capital (think Mint.com with extra bells and whistles). Once your accounts are added, we'll have a clearer overall picture of where things stand money-wise since all the major information will be in one place.

Meeting 3- Getting Things Done- Short-Term

Some money issues need faster attention than others, so we'll be addressing the immediate items in this meeting. This usually includes ensuring your tax situation is in order, spending isn't greater than income, and major insurances are in place to protect should catastrophe strike.

Meeting 4- Getting Things Done- Long-Term

For those issues that are important but more down-the-road, we'll address here. This usually includes ensuring that your saving and investing are on track, debt load is minimized, and there is a plan for your family and things when you die (later rather than sooner, right?).

Meeting 5- Putting It All Together

At this point, we've covered a large amount of information, and a few months have probably passed. We'll pull together all that we've been working on and present how things currently stand, as well as a to-do list to keep things on track.



Meeting Schedule- Ongoing

Spring Meeting- Taxing Season

Taxes are in the air! I'll be in contact to gather needed info and get your taxes filed with as little pain as possible. If we've been working together already, then we should have prepared in prior months to avoid unwelcome surprises (like congrats---Uncle Sam needs another \$15k...in 3 weeks).

Summer Meeting- Mid-Year Weigh-In

We'll be checking in to see how taxes are looking so far (how much you've made, paid in estimated tax payments, and expect to make for remainder of year). We'll also look in at the progress you've made in your to-do's for the year. No judgement, just accountability .

Fall Meeting- Investments and Misc. Check-In

Reviewing your investments and checking in on other outstanding concerns will be the focus here. For investments we manage directly, we'll discuss any upcoming adjustments. For investments we don't manage, we'll give recommendations for adjustments to make on your end.

Winter Meeting- Year-End Weigh-In and Look Ahead

Part history and part future, we'll take inventory on how the year ended (taxes, progress on to-do's, review of overall finances) and look ahead to set goals and to-do's for the upcoming year.