

Our Approach

A guided path toward clarity, confidence, and long-term direction—so you always understand where you stand and where you're going.

1 Personal Insight Meeting

During our initial meeting together, we want to take the time to get to know you and what questions you'd like answered.

2 Deep Dive Meeting

During this session, we will work with you to prioritize and define your goals.

3 Clarity Meeting

During this meeting, we will review your goals and have a collaborative discussion about your cash flow strategies.

4 Solutions Meeting

We'll walk you through our team's recommendations for your unique financial plan and make sure you feel confident moving forward.

5 Implementation Meeting

This includes opening and funding accounts and walking through next steps—so you understand how everything is working together.

6 Statement Reading Meeting

One to two months after your initial account funding, we'll meet to review your accounts, set up access, determine your desired review schedule. You'll also meet the full Fathom team—so you know exactly who's supporting you moving forward.

7 Targeted Review Meetings

As life evolves, we adjust strategies, track progress, and make sure everything stays aligned with your goals.