CLIENT EXPERIENCE

FIVE OCEANS ADVISORS

	Q1	Q2	Q3	Q4
LIFE STRATEGY	• ***Priorities Manifest Meeting*** ❖ • Blueprint for Thriving • Life Strategy Group Workshop	• MAP Planner - Mindful Approach to Productivity • Life Strategy Group Workshop • Family Governance & Education	• ***Well-Being Check-in Meeting*** ❖ • Quality of Life Visioning • Life Strategy Group Workshop	• Strategic Plan Tracker • Life Strategy Group Workshop • Pre/Post Life Exit Planning
FINANCIAL STRATEGY	• Tax-Advantaged Account Contributions • Required Minimum Distributions • Education Planning • Impact Analysis • Quarterly Market Update	• ***Spring Financial Review Meeting*** ❖ • Financial Structure Update • Portfolio Rebalancing • Advanced Estate Plan Review • Quarterly Market Update	• Life Insurance Review ✷ • P & C Insurance Review ✷ • Develop legacy/wealth transfer objectives • Track Private/Alt Investments • Quarterly Market Update	• ***Fall Financial Review Meeting*** ❖ • Charitable Contribution Planing • Tax Return Review • Quarterly Market Update
BUSINESS SERVICES	• Business Valuation	• Business Insurance Analysis	• Business Continuity Planning	• Business Owner Tax Strategy
DELIVERABLES	• Priorities Manifest • Impact Analysis Report	• Estate Plan Flow chart • Personal Five Oceans Summary	• Well-Being Summary • Business Strategy Summary	• Personal Five Oceans Summary • Tax Strategy Summary

IN ADDITION TO THE FALL SPRING FINANCIAL REVIEW MEETINGS, YOUR ADVISOR IS AVAILABLE TO MEET YEAR-ROUND ON AN AS-NEEDED BASIS

✷ Review occurs at least every two years
❖ Meetings are via Zoom or in-person