VALUES-CENTERED PLANNING PROCESS

Explore

Initial 90-Minute Meeting

- About You
- About One Life
- Customize Your Plan

Onboarding Call

- Meet the Team
- Review Cash Flow Assumptions
- Gather Outstanding Documents & Information
- Introduction to new planning tools

Values and Vision Meeting

- Values & Vision Assessment
- Discuss Your Core Values
- Brainstorm Ideas & Opportunities
- Clarify Financial Life Goals
- Discuss Planning Opportunities

*Services beyond the Initial 90-Minute Meeting require an agreement. An ongoing services agreement is required to open and fund accounts. You are under no obligation to engage in ongoing services.

Plan

Investment Planning Meeting

- Open & Fund Your Accounts*
- Develop Your Financial Plan
- Risk Management & Investment Strategy
- Social Security Analysis & Plan Integration
- Tax Efficient Distribution
- Discuss Implementation

Implementation Meeting

- Finalize Implementation Strategy
- Company Retirement Plan Maintenance (investment research, selection and rebalancing)
- Personal IRA, Roth IRA, brokerage, and trust account maintenance
- Discuss & prioritize custom financial planning maintenance (e.g. insurance, charitable giving, company benefits, etc.)

Thrive

Ongoing Wealth Management

- Tax Minimization
- 401(k) Management
- Investment Research and Trading
- Ongoing Portfolio Monitoring, Research, Rebalancing & Trading
- Retirement Planning
- Assess Opportunities
- Goal Tracking
- Life Coaching
- Employer Benefits (stock awards, pension, etc.)
- Education Planning
- Estate Planning
- Charitable Giving
- Insurance Planning
- Social Security Benefits
- Emergency Fund Strategies
- Cash Flow Coaching
- Account Maintenance
- Track Progress

ONE LIFE ONGOING WEALTH MANAGEMENT

INVESTMENT ADVISORY SERVICES OFFERED THROUGH **ONE LIFE FINANCIAL GROUP, INC.**

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