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

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

Proactive 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

*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.

ONE LIFE ONGOING WEALTH MANAGEMENT