Affordable Family Office Timeline

Timeline	Meeting	Action Items
Week 1	Pre GO meeting Tasks for Client	• Logged into client portal • Populated portal with net worth information • Completed financial planning questionnaire • Set up GO Meeting
Week 1	Get Organized (GO) Meeting	• Sign contract • Review net worth, goals, and plan assumptions • Understand investment risk tolerance • Develop account consolidation plan • Complete account opening, rollover, and 401k access paperwork
Week 3	Data Confirmation Received & Reviewed	• Confirm D3's understanding of goals and assumptions used in plan
Week 5	Financial Plan Received & Reviewed	• Review financial plan and set up plan review meeting with Financial Counselor
Week 6	Financial Plan Review	• Review plan with Financial Counselor • Select investment strategy
Week 7	Investment Strategy Review	• Review customized investment recommendations with Financial Counselor and give D3 approval for implementation
Week 9	Estate Plan Review (if necessary)	• Review beneficiary titling, wills, trusts, and powers of attorney with Financial Counselor