

## Broad Based Plan Timeline

Timeline	Meeting	Action Items
Week 1	Pre GO meeting Tasks for Client	<ul style="list-style-type: none"> <li>• Logged into client portal</li> <li>• Populated portal with net worth information</li> <li>• Completed financial planning questionnaire</li> <li>• Set up GO Meeting</li> </ul>
Week 1	Get Organized (GO) Meeting	<ul style="list-style-type: none"> <li>• Sign contract</li> <li>• Review net worth, goals, and plan assumptions</li> <li>• Understand investment risk tolerance</li> </ul>
Week 3	Data Confirmation Received & Reviewed	<ul style="list-style-type: none"> <li>• Confirm D3's understanding of goals and assumptions used in plan</li> </ul>
Week 5	Financial Plan Received & Reviewed	<ul style="list-style-type: none"> <li>• Review financial plan and set up plan review meeting with Financial Counselor</li> </ul>
Week 6	Financial Plan Review	<ul style="list-style-type: none"> <li>• Review plan with Financial Counselor</li> <li>• Select investment strategy</li> </ul>
Week 7	Investment Strategy Review	<ul style="list-style-type: none"> <li>• Review customized investment recommendations with Financial Counselor</li> </ul>
Week 9	Estate Plan Review (if necessary)	<ul style="list-style-type: none"> <li>• Review beneficiary titling, wills, trusts, and powers of attorney with Financial Counselor</li> </ul>