Goal Planning Service (GPS) 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
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