

Hourly \$O\$ Timeline

Timeline		Action Items
Week 1	Pre-Hourly Meeting Tasks for Client	<ul style="list-style-type: none">• Provide D3 with list of questions to be answered during meeting• Provide D3 with pertinent information about questions, i.e. account statements, tax return, pay stub, budget, loan information, etc.
Week 1	Hourly Meeting	<ul style="list-style-type: none">• Meet with D3 to review questions and receive recommendations
Week 1	Meeting Follow Up	<ul style="list-style-type: none">• D3 provides a summary of action steps and recommendations from meeting