FIDATO WEALTH®
COMPREHENSIVE FIDUCIARY ADVICE

# Wealth Management Consultative Process

## 1 DISCOVERY MEETING
- Introduction
- Conduct Discovery

1-2 WEEKS

## 2 INITIAL ANALYSIS MEETING
- Presentation of Total Client Profile
- Cover Wealth Planning Fundamentals
- Review Initial Analysis

1 WEEK

## 3 FINAL ANALYSIS MEETING
- Confirmation of Analysis
- Confirm Initial Planning Priorities
- Mutually Confirm Fit & Working Relationship

45 DAYS

## 4 STRATEGY MEETING
- Plan Organization
- Advanced Planning Kick Off

ONGOING

## 5 ONGOING WEALTH MANAGEMENT
- Annual Progress Meeting
- Focused Planning Meetings
- Ongoing Optimization & Implementation

## WEALTH MANAGEMENT ANALYSIS

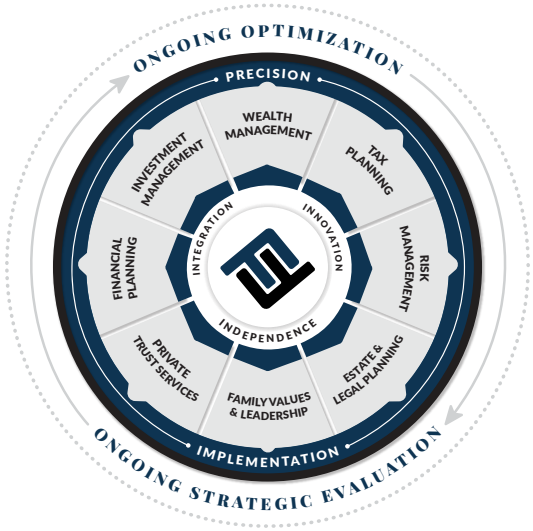
Review of Your Goals and Diagnostic of Your Current Situation Which Identifies Proficiencies and Deficiences. Confirm if We Can Add Significant Long Term Value.

## ADVANCED PLANNING

Comprehensive Evaluation of the Entire Range of Financial Planning Needs with Our Recommendations

## OUR PROFESSIONAL NETWORK

Team of Carefully Selected Professionals, Each With a Very High Level of Knowledge and Skill in Key Financial Areas

## PROFESSIONAL NETWORK MEETINGS

Our Team of Specialists Applies its Expertise to Evaluate All Aspects of Your Financial Situation and Devise Appropriate Solutions