FLATIRON
WEALTH ADVISORS LLC

FINANCIAL PLANNING PROCESS

Initial Meeting	Discovery Meeting	Get Organized Meeting	Explore Possibilities Meeting	Plan Delivery Meeting	Ongoing Financial Planning
30 Minutes	**60 Minutes**	**60-90 Minutes**	**60 Minutes**	**60 Minutes**	**Quarterly**
This gives each of us a chance to get to know each other, allow you to communicate your needs, concerns, and goals for working with a financial planner, and for us to decide if it makes sense to move to the next step. This is a free consultation.	This meeting allows us to learn more about you. I will focus on your concerns, goals, and desires. I will do some high-level data gathering and ask questions to allow me to understand your unique needs and objectives. This is a free consultation. After this step, I will follow up with a proposal.	Once you decide to go forward, I will ask for more detailed information from you. At this meeting, I will review what you have submitted, collect any necessary details while helping you sort through your financial lives and get organized. I will also start the process of understanding your investment tolerance and "risk profile" so we can start building out a financial plan.	Analyzing and evaluating your current financial status together using our financial planning software.	Developing and presenting financial planning strategies. The goal is to commit to implementing the top 1 or 2 recommendations.	We will implement the remaining financial planning recommendations together and meet quarterly to ensure that we are making progress.