

# THE CLIENT WELCOME EXPERIENCE

THE  
**PARR McKNIGHT**  
WEALTH MANAGEMENT GROUP

CLARITY. CONFIDENCE. STRUCTURE.

## STEP 01

### GETTING TO KNOW EACH OTHER

- Discuss your current financial landscape
- Identify your unique goals, values, dreams, special concerns and challenges

## STEP 03

### STRATEGIES AND SOLUTIONS MEETING

- In-person meeting to review comprehensive wealth management solutions and strategies including tax control, income generation and additional resources
- Finalize plan, strategies, and portfolio

## STEP 05

### STRATEGIES AND SOLUTIONS IMPLEMENTATION

- Open new accounts
- Transfer existing assets
- Introduce support team

ONGOING ►

## STEP 02

**WEALTH MANAGEMENT PROFILE AND PLAN**  
*Develop comprehensive Wealth management plan and understand important Wealth Management Concepts*

- Family Financial Overview
- Develop a Plan
- Wealth & Investment Management
- Liability Management
- Retirement Plans & Company Benefits
- Retirement Income Planning
- Insurance & Asset Protection
- Legacy Planning & Philanthropy
- Advanced Planning
- Coordination with CPA & Attorney

## STEP 04

### REVIEW, REFINE AND RECOMMEND

- Analyze current investment portfolio and refine strategies
- Review recommendations around income, stability of principal and growth basis, reconciliation and transfer costs
- Develop strategies based on recommendations

## STEP 06

### 45-DAY FOLLOW UP

- In-person meeting
- Discuss statements
- Organize documents
- Review online capabilities and set up online account access
- Develop a schedule for ongoing calls, meetings and regular check-ins

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