

# THE PARR MCKNIGHT DIFFERENCE

## Initial Consultation

### GETTING TO KNOW EACH OTHER

- About you
- About us
- Identify how or if we can help

CLARITY

#### GATHER & ORGANIZE

*Gather your essential data, securely organize it, create reports, develop tailored scenarios, analyze plans, and pinpoint strategies and concerns.*

## Planning Consultation

### PLANNING CONVERSATION

- Review initial plan
- Discuss relevant strategies to implement for tax control, income generation, estate, etc.
- Share insights from investment analysis

CONFIDENCE

#### REVIEW & REFINE

*Refine a draft of your plan, further tailoring it to fit your goals and develop recommendations.*

## Final Consultation

### SHARE RECOMMENDATIONS

- Review comprehensive plan
- Present investment recommendations
- Next actions & **establish regular meetings customized to client needs**

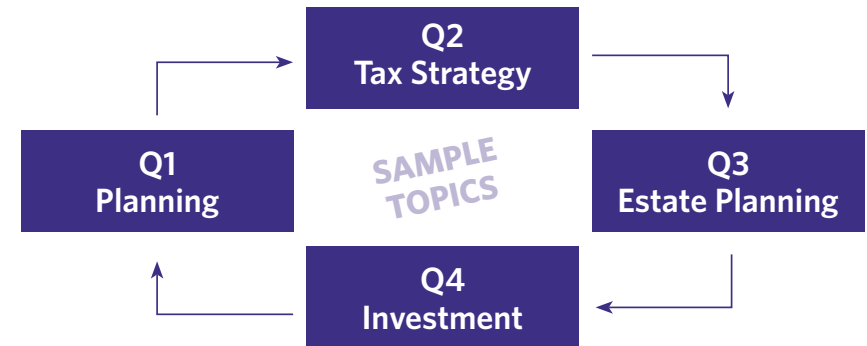
STRUCTURE

#### CLIENT WELCOME EXPERIENCE

*Open your accounts, transfer assets, explore online tools, implement strategies, and schedule a 45-day personalized follow-up check-in.*

THE  
**PARR McKNIGHT**  
WEALTH MANAGEMENT GROUP

CLARITY. CONFIDENCE. STRUCTURE.



#### ADDITIONAL TOPICS:

Education • Executive Compensation • Cyber Security • Philanthropy

#### ADDITIONAL TOUCH POINTS MAY INCLUDE:

Emails/Newsletters • Webinars • 24 Hour Response • 911/411  
Quarterly Thematic Content • Comprehensive Annual Strategy Session • On Demand Consultations • Ongoing Admin & Ops