Financial Advising Program

Discovery Meeting:

Our first detailed meeting with the sole purpose of getting to know each other . About 90 minutes.

Topics of Conversation:

- What are you worried about?
- What are your goals?
- What do you value?
- Your current lifestyle
- Your workplace benefits
- Basic investing education
- Your current financial situation
  - -Income
  - -Expenses
  - -Debt
  - -Investments
  - -Insurance

By the end of this meeting, we should be able to tell if we'd be a good fit to work together.

Foundation Meeting:

Presenting and discussing the outline of your custom plan based on the conversation had during the Discovery Meeting. 60 - 90 minutes.

Foundation outline could cover:

- Cash flow management
- How to achieve your goals
- Proper investments and allocation
- Preparing to make work optional
- Debt Management
- Appropriate insurance
- Estate Planning
- Family/Education Planning

To move past this point, we'll need to officially commit to working together

Implementation:

I'll walk you through building the foundation of your plan one step at a time. Including:

- Establishing the proper accounts
- Setting up savings and payment plans
- Maximizing work place benefits

Ongoing:

I expect to work with my clients for 30+ years, helping you update, maintain, and stick to the plan as your life changes. There will be:

- Detailed annual reviews
- Quarterly email check-ins
- Semi-annual updates

Additional Client Benefits:

Impeccable Service - you'll always have the ability to speak directly with me.

Work With Me Virtually - whether you're 10 miles away or 10,000. All meetings can be done through Google Hangouts, in-person, or any combination of the two.

Professional Investment Management

Client Portal - 24/7 online access to your accounts

My Network - Access to other helpful professionals

Bi-monthly Newsletter - tips and commentary automatically delivered to you

Instant Access - get advice when ever a new situation arises

Education - continually increase your financial knowledge

Jacob Parish
Schooner Financial
9917 E Bell Rd, Suite 110
Scottsdale, AZ 85260
480-284-6820
jacob@schoonerfn.com
www.schoonerfn.com