New Client Process

ABC Financial

Title	Topics	Action Steps
Introduction Phase	Uncover Your Planning Goals	No action needed in this phase. We will use the Master List Of Goals checklist to help uncover your planning goals.
Initial Planning Phase	Uncover Planning Opportunities and Issues	Before we kick-off this phase, please review the New Client Checklist. It will help serve as the agenda for our discussions.
Review Phase	Estate Planning Document Review Investment Review	In this phase, we will review important documents and your investments.

At ABC Financial, we guide our clients through three broad phases to make sure that we have uncovered all the critical financial planning issues. If you have any questions about this process, please email me at john@abcfinancial.com or give us a call 555.555.5555. We look forward to serving you!

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