LifeSpan Financial Strategies

OUR WEALTH MANAGEMENT PROCESS

- - 2 weeks - -

- - 0 to 30 days - -

- - 90 days - -

- - 6 to 12 months - -

01 Financial Planning Meeting

Understand goals, development of financial plan

Building financial plan and developing investment plan and proposal

02 Investment Plan Meeting

Presentation of investment plan

Advisory and Operations teams creating implementation plan

03 Implementation of Investment Plan

Execute investment recommendations, receive access to web portal

Overseeing financial goals and managing investments

04 Follow Up Meeting

Review of financial plan and investments

Updating financial plan

05 Regular Progress Meeting

Update goals and financial/investment plan