

1 | Discovery

- Get to know each other and gain an understanding of your goals and financial situation.
- Provide an overview of the services and approach that Allworth Airline Advisors offers.

2 | Strategy Proposal

- Engage in a discussion about the benefits of the proposed action plan and investment strategy.
- Address any questions or concerns you may have.

3 | Implementation

- Establish necessary accounts, investments, and other essential components.
- Facilitate all paperwork and documentation and discuss the implementation process timeline.

4 | Financial Assessment

- Conduct a detailed analysis to identify areas for potential improvement or optimization.
- Review all financial documents, including income, expenses, assets, and debts.

5 | Financial Plan Presentation

- Present a comprehensive cash flow strategy and a plan for tax-efficient savings and income.
- Construct a portfolio that aligns with your risk tolerance and goals and stress-test potential pitfalls.

6 | Progress Update

- Monitor and track your progress towards your financial goals ensuring your plan remains aligned.
- Provide updates on investment performance and portfolio allocation.

7 | Annual Review Meeting

- Evaluate the past year and discuss any significant life changes in your financial situation.
- Adjust strategies for the upcoming year based on your evolving needs and objectives.

8 | Ad Hoc Meetings and Ongoing Communication

- Address any urgent matters, major life events, or specific concerns you may have.
- Determine the next steps or follow-up actions to ensure your financial plan remains on track.
- Stay connected and remain readily available for any questions or updates you may need.

*All meeting schedules and agendas are flexible and will be adjusted based on your needs and circumstances.