WOLFGANG
CAPITAL®

CLIENT ONBOARDING PROCESS

1 DISCOVER
First Visit

Get to know each other & address your goals & concerns.

- Review any current plans for: income, investments, taxes, healthcare and your legacy.
- We'll share our investment philosophy and team approach.
- Based on the initial consultation, you can then decide to move forward with a second meeting.

(approx. 7 days between appointments)

2 EVALUATE
Second Visit

Review analysis of current accounts & share first draft of plan.

- Review of the following analyses: risk, cost, income, social security, taxes and RMDs (required minimum distributions).
- We'll share a first draft of your custom retirement plan.
- After this meeting we'll establish your financial goals and discuss whether not our services can meet your needs.

DECIDE IF WE SHOULD WORK TOGETHER

(approx. 1-4 weeks between appointments)

3 DELIVER
Third Visit

Review plan structure, expectations & your secure online account.

- We'll walk you through each step of your Whole Picture Retirement Plan® and begin advanced implementation.
- We'll demo your secure online account where you can upload important documents and check out your portfolio.
- We'll recap expectations, your meeting routine and accounts.

(approx. 1-4 weeks between appointments)

4 FINALIZE
Fourth Visit

Wrap up your Whole Picture Retirement Plan® and accounts.

- A fourth appointment is not always necessary, but in some cases may be required to finalize your Whole Picture Retirement Plan®.
- We'll carry out the advanced implementation of your plan.
- We'll answer any questions and schedule your client review.