DEFINE FINANCIAL

CLIENT ONBOARDING

New Client Onboarding Steps

- 01 WEEK ONE — Sign DF Client Agreements
- 02 WEEK TWO — Onboarding Meeting
- 03 WEEK THREE — Open Fidelity Accounts & Transfer
- 04 WEEK FOUR — Investment Policy Statement (IPS) Meeting
- 05 WEEK FIVE — Implement Your IPS
- 06 WEEK SIX & Beyond — Ongoing Retirement Planning

6 Core Planning Areas

TAX PLANNING
Multi-year strategic planning to minimize taxes over the course of your lifetime.

INVESTMENT MANAGEMENT
Evidence-based investment advice tailored to your retirement, risk, and time horizon.

CHARITABLE GIVING
Create a long-term giving plan to accomplish your charitable goals and reduce taxes.

ESTATE PLANNING
Ensure you have the right documents in place and they reflect your wishes and intent for the next generation.

INSURANCE PLANNING
Maximize your existing insurance policies and explore additional insurance when necessary.

RETIREMENT PLANNING
Stress test your retirement plan and create a reliable income stream.