



Real Life[®] Financial Solutions Map

Initial Interview

Are you comfortable with the process and the individuals?

Engagement Letter

Outlines scope of plan and any fees involved

“Real Life Financial Plan”™ Discovery Exercise

Gather financial and non-financial data

Your “Real Life Financial Plan”™ Draft #1

Review and Return

Your “Real Life Financial Plan” Draft #2

Final copy presented with recommendations

Implementation

Disclosure Document and Investment Policy

Regular Reviews

Review and modify as necessary