OUR FINANCIAL PLANNING PROCESS

If you have any questions, please do not hesitate to call us for assistance at any point.

Step 1: 1st Meeting:

We will:

- Assist you in determining and clarifying your personal and financial goals, needs and priorities.
- Provide a checks list of documents that you will need to gather and bring to the next meeting.
- Discuss Fee arrangement
- Schedule 2nd meeting

Step 2: 2nd Meeting

- Assist you in completing the fact finder
- Finalize your personal and financial goals, needs and priorities
- Finalize which areas of planning will be included
- Finalize Fee Agreement and completion of Schedule A
- Schedule 3rd meeting

Step 3: 3rd Meeting

- Present your comprehensive, customized analysis, projections and plan
- Present a detailed strategic plan and action guide
- Provide assistance and guidance prioritizing plan implementation

Step 4:

- Build your personal Daily Wealth Management website; **You will immediately be able to view all accounts, cash flow and financial information we have entered**
- If you desire to utilize the real time features of the program (where you can view your aggregated account values, assets, net worth, etc. at any given moment,) we can set that up for you or guide you through the process.
- Assist you in setting up your personal vault.

Step 5: Annual Reviews

- Schedule first annual update review

Frye Financial Center 20900 West Dixie Highway Aventura, FL 33180 (305)-931-3200
www.fryefinancial.com