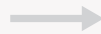


NEW CLIENT FLOW CHART

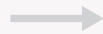
START



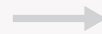
Introductory phone call or e-mail.
Is there a reason for us to do business together?



First meeting
Meet and Greet



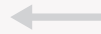
Questionnaire to client and schedule presentation meeting/meetings



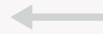
Questionnaire and documents back to us



Enter client service model and schedule preferred review meeting time



Take action on improvements



Client and Advisor meet to discuss strategic and tactical changes
(typically 1-3 meetings)

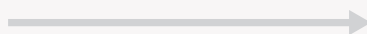


Advisor and paraplanner prepare summary of audit and recommendations



Agree to constitution:

1. We will respond to you in a timely manner
2. You will respond to us in a timely manner
3. We will always put your best interest first
4. We will not waste your time with pointless meetings or phone calls



FINISH



Introduction to successful, friendly and open minded friends and peers like yourselves.