



CLIENT TIMELINE

NEW CLIENTS



GETTING STARTED

Review the contracts & understand expectation of relationship

30-60 MINUTES

ONCE ALL DOCUMENTS ARE RECEIVED



ALIGNMENT

Learn our approach & develop a mix of investments for you

30 or 90* MINUTES



DISCOVERY

Talk about your individual values and discover your goals

90 MINUTES

MINIMUM OF 1 WEEK



DESIGN

Take a deep dive into your finances while we plan for your dreams

90 MINUTES

MINIMUM OF 2 WEEKS



IMPLEMENTATION

Understand your Custom Financial Blueprint®

90 MINUTES



FIRST QUARTERLY REPORT
Jan, April, July, or Oct

1 TO 2 WEEKS



FOLLOW THROUGH & SUPPORT

We'll call you to see if need support

15 MINUTES



TAILORING

Review your first quarterly report

30 MINUTES

6 MONTHS

BIANNUAL REVIEWS



ANNUAL INVESTMENT MANAGEMENT REVIEW

60 MINUTES

6 MONTHS



ANNUAL FINANCIAL PLANNING REVIEW

90 MINUTES

*Rebellionaires® Alignment runs 90 minutes. There may be additional meetings with Bradford.