What to expect from our firm

CAPITAL GROUP®

In the next 30 days...

Introductions: You will get a list of all the members of our team, along with everyone's roles and contact info.

Goals conversation: During this meeting, we'll discuss, organize and prioritize your financial goals.

Account setup and transfer: Our team will collect some information to set up your new accounts and transfer money in from other accounts.

Gathering documents: You'll provide some documents, like insurance policies and tax returns, that will help us build a comprehensive plan for you.

Tech setup: You will receive instructions about how to set up and use your online account, along with other digital tools that you might find useful.

Within 60 days...

Meetings: We will plan out a cadence of check-ins so that we're always helping you stay on track to reach your goals.

Financial plan: Together, we'll review your comprehensive, detailed financial plan.

Investments: Based on your goals and a thorough gap analysis, we'll prepare and present investment recommendations.

Document review: We will update or create some important documents as needed to ensure you're on track to reach your goals.

Events and resources: You'll begin receiving invitations to events and other resources based on your specific goals and needs.

Over 90 days and beyond...

Connecting with other pros: To make sure we're helping you holistically, we'll work with the other professionals helping you, such as attorneys and accountants.

Annual review: Every year, we'll conduct a comprehensive review of your plan and goals.

Portfolio management: We will continuously monitor your portfolio, rebalancing and making changes as needed.

Navigating life changes: As new events take place in your life, we'll help you take the necessary steps to manage them financially.

Proactive updates: You will be informed about big market changes, legislative updates and other factors that might impact you and your plan.

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YOUR LOGO HERE

In the next 30 days…	Within 60 days…	Over 90 days and beyond…

Capital Client Group, Inc.

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