



GOALS

- ✓ Allocate funds according to your investment strategy.
- ✓ Review initial investment approach at the 45-day mark.
- ✓ Develop your ability to track and monitor your funds.

PUT YOUR MONEY WHERE YOUR GOALS ARE.

Once we're aligned on your investment approach, we will move your funds into the appropriate assets and portfolios. This phase is largely procedural since we've already selected those investments that best meet your needs.

We still like to conduct a 45-day check in to ensure all funds have been distributed correctly and more importantly to help you understand your new portfolio reporting and management tools.

In this session, we will walk your through:

- Your overall portfolio and account distribution.
- How to read your portfolio statements, confirmation reports, and any other regular correspondence.
- Your client portfolio dashboard, where you can monitor funds and performance.