Our Client Onboarding Process

A step-by-step timeline

Welcome Aboard!

At Family Wealth Management, we're committed to guiding you on your financial journey. Our structured process ensures a clear, collaborative, and results-oriented experience. Here's what you can expect:

Step-by-Step Timeline

Step 1: Discovery Meeting

- **Goal:** Understand your financial and personal goals, current situation, and risk tolerance.
- **What to Expect:** In-depth conversation, initial data gathering, current investment analyzation, and sample illustrations.
- **Outcome:** Mutual understanding and agreement to move forward. Making sure it is a ‘fit’ for both sides.

Step 2: Onboarding (1st Month)

- **Goal:** Seamlessly integrate you into our system.
- **What to Expect:** Our FWM Welcome Kit, completion of necessary paperwork, account setup, and introductions to our team.
- **Outcome:** Fully established client profile and access to our resources.

Step 3: Outlining Solutions

- **Goal:** Develop tailored strategies to achieve your objectives.
- **What to Expect:** Discussion of investment options, asset transfers, and collaborative decision-making.
- **Outcome:** A clear, actionable plan aligned with your goals.

Step 4: Orientation (2nd Month)

- **Goal:** Familiarize you with our tools and resources.
- **What to Expect:** Walkthrough of our client portal, explanation of reporting procedures, and demonstration of key features.
- **Outcome:** Confidence in navigating our platform and understanding your financial data.

Step 5: Integration (3rd Month)

- **Goal:** Implement the agreed-upon investment plan. Coordinate with other members of your Wealth Team.
- **What to Expect:** Execution of investment strategies, coordination with other professionals (e.g., accountants, attorneys, insurance agents), retirement projections, business and family succession planning, estate planning, and philanthropy.
- **Outcome:** Your plan in action, working towards your goals.

Step 6: On-going Strategy

- **Goal:** Continuously refine and optimize your investment plan. Scheduled like Dentist Check-ups.
- **What to Expect:** Regular reviews, proactive adjustments based on market conditions and life events, ongoing communication, and value-added service.
- **Outcome:** Long-term financial success and confidence.

We have built our process to help ensure that we meet your needs and goals.

- *We prioritize your financial well-being.*
- *We offer transparent communication.*
- *We deliver personalized solutions.*

Next Steps

We are excited to work with you. If you have any questions or would like to schedule a follow-up meeting, please don't hesitate to contact us at **(801) 666-7020**

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