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:

1
STEP

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.

2
STEP

Onboarding

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.

3
STEP

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.

4
STEP

Orientation

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.

5
STEP

Integration

Goal: Implement the agreed-upon investment plan and coordinate with your Wealth Team.

What to Expect: Execution of investment strategies, coordination with other professionals (accountants, attorneys, insurance agents), retirement projections, business and family succession planning, estate planning strategies, and philanthropy.

Outcome: Your plan in action, working towards your goals.

6
STEP

Timely Strategy & Reviews

Goal: Continuously refine and optimize your investment plan — scheduled like dentist check-ups.

What to Expect: Regular reviews and adjustments based on market conditions and life events, timely communication, and value-added service.

Outcome: Long-term financial success and confidence.

Your Well-Being First

We have built our process to prioritize your financial well-being above all else.

Transparent Communication

We believe in open, honest dialogue at every stage of your journey.

Personalized Solutions

Every strategy we develop is tailored specifically to your unique needs and goals.

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.

(801) 666-7020

Rob Cheney — Financial Advisor | Conner Green — Associate Advisor | Julie Cheney — Admin. Assistant

OUR SERVICES

Over the years we have adapted and crafted our comprehensive services to better meet your unique and complex needs. Below is an overview of three key areas we focus on to help you build wealth and develop ***financial confidence.***

◈ WEALTH PLANNING

- ◊ Cash Flow Planning
- ◊ Retirement Planning
- ◊ Risk Management
- ◊ Tax Planning Strategies
- ◊ Estate Planning Strategies
- ◊ Social Security Optimization

◈ INVESTMENT MANAGEMENT

- ◊ Portfolio Construction
- ◊ Asset Allocation Strategy
- ◊ Risk-Adjusted Returns
- ◊ Diversification Analysis
- ◊ Performance Reviewing
- ◊ Rebalancing & Optimization

◈ BEHAVIORAL FINANCE

- ◊ Investor Psychology Coaching
- ◊ Bias Identification & Mitigation
- ◊ Emotion-Aware Decision Making
- ◊ Long-Term Discipline Planning
- ◊ Goal-Based Mindset Framework
- ◊ Accountability Relationship

Building Wealth. Developing Financial Confidence.

We are committed to providing personalized guidance at every stage of your financial journey.