Unrivaled
WEALTH MANAGEMENT

PROSPECTIVE CLIENT PROCESS

1 INTRODUCTORY CALL

Expected Duration: 45 minutes to an hour

Meeting Goals

- Get to know each other.
- Discuss your situation and priorities.
- Explain how we help clients like you.
- Answer your questions.

End Result

- If we both feel there could be value in working together, we'll schedule a proposal meeting.
- If either of us feels we aren't a fit, we'll help you find someone who is.

2 PROPOSAL MEETING

Expected Duration: 45 minutes to an hour

Meeting Goals

- Confirm we understood the priorities you shared in our first meeting.
- Demonstrate how we'll help you go from where you are to where you want to be.
- Review a fee estimate, next steps, and what it looks like to work together.

End Result

- No hard sell.
- If you need more time, we'll schedule a decision meeting.
- Gather thoughts and questions about the proposal without pressure.

3 DECISION MEETING

Expected Duration: 20-30 minutes

Meeting Goals

- Answer your remaining questions.
- Provide the information you need to make a confident decision.

End Result(s)

- Agree to partner; or
- Suggest solutions better fit for your needs.

4 CLIENT ONBOARDING

- Sign client agreement.
- Organize your financial life.
- Form and implement recommendations.
- Enjoy more time, energy, clarity, and peace of mind.