Financial Independence Advisors

The 3 Steps to Becoming an FIA Client

Introduction

(15 minutes)

- Let’s get to know each other
- Is there value continuing the conversation?

Mutual Discovery

(30-60 minutes)

- What are your needs?
- What services do we provide?

Onboarding

(30-60 minutes)

- Do your needs and our services align?
- Begin account opening process

Venues

Phone

In-person

Web Conference

Financial Independence Advisors

Welcome to Financial Independence Advisors

Our personalized client onboarding process provides a strong foundation for establishing our long-term professional relationship. We invest the time to help ensure all bases are covered, all details are addressed, and all parties are on the same page.

Defining Your Goals

In our first meeting together, we will discuss what matters most to you. We want to know what your goals/priorities are so we are able to customize a financial plan for you. We want to hear what your expectations will be for us and also tell you about ourselves and our commitment to serving you.

Day 1

WHY WE DO IT

We want to start our relationship on the right foot with a clear vision so we develop a long-standing collaboration with momentum towards your goals.

Strategy Overview

In our second meeting, we will discuss and set expectations, review our investment process and reaffirm our commitment to your financial goals. Based on our previous meeting, we will define our strategy around the objective of accomplishing your goals.

Within 30 Days

WHY WE DO IT

Everyone's story is very different. This meeting provides an opportunity to follow up, collaborate, and reaffirm our commitment to the strategy and plan we are implementing together.

Welcome Aboard

Once we have embarked on the strategy mutually agreed upon, we will want to make sure you have online access and cash management tools. Ensuring you are properly set up to receive statements and communications according to your preferences, we'll walk you through how to access these at any time, from anywhere.

Within 45 Days

WHY WE DO IT

Engagement via the most convenient and desirable avenues for you is very important to us, so we'll set these parameters for the relationship moving forward.

Ongoing Optimization

Once you are on the road to freedom, we will review your personalized, comprehensive financial plan, and reassess/reprioritize your goals, if necessary. We implement "Our Process," which functions as the monitoring service that affirms your goals, addresses estate planning concerns, mitigates risks, and reduces tax burden.

Ongoing

WHY WE DO IT

We want to monitor progress and reprioritize goals when necessary so we can maintain momentum. You'll have a schedule for the coming months to make sure all open items are addressed in a timely manner.

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200 Ledgewood Place Suite 101 Rockland, MA 02370 781-780-5920

Financial Independence Advisors

We help cover the many aspects of your financial well-being.

Our Process

Our Process is the monitoring strategy we use to help cover the many aspects of your financial well-being throughout the year. We've designed this strategy to comprehensively review your financial health during applicable times of the year and in a manageable work flow. With this process we can leverage trusted resources of our own, as needed, or existing professional relationships you've already established.

JANUARY – MARCH

Investment & Financial Planning

Cash Flow Analysis • Review of Debts
Create Goals • Review Progress of Goals
Review Risk Tolerance
Asset Allocation Review
Diversification of Assets • Stock Options

APRIL – JUNE

Estate & Legacy Planning

Establish Will, Power of Attorney, Health Care Proxy
Trust Considerations (Revocable & Irrevocable)
Gifting Strategies
Review Current Estate Documents

JULY – SEPTEMBER

Risk Management & Asset Protection

Health Insurance • Dental & Vision Insurance
Short-Term & Long-Term Disability Insurance
Long-Term Care Insurance • Life Insurance
Property & Casualty Insurance
Review Company Benefits • Review Risk Tolerance

OCTOBER – DECEMBER

Tax & Income Planning

Review W2 or 1099 • Review Prior Year Return
Determine Saving Location(s)
Contribution(s) Discussion • Estate Taxes
Gift Taxes • Probate

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