

mainstreet

FINANCIAL PLANNING

ROADMAP CALENDAR

1



ORGANIZE/PLAN

INITIAL MEETING

- Discuss Roadmap Process
- Understand Needs
- View Samples
- Estimate Fees
- Sign Agreement



GOALS SESSION

- Finalize Financial Statement
- Finalize Spending Plan
- Identify Goals
- Financial Self Satisfaction Discussion



INTERACTIVE SESSION

- Model Money Roadmap Scenarios
- See Goals in Action

2



IMPLEMENT

PRESENTATION SESSION

- Discuss Recommendations
- Create Action Items



TAKE ACTION

- Attend Educational Webinars
- Use Advisor Hotline
- Check Off To-Dos

3



MONITOR & FOLLOW UP

6 MONTH SESSION

- Review Implementation Progress



BEGIN NAVIGATION
SUPPORT SERVICE



NEXT PHASE

