



# REAL ESTATE WEALTH PLANNING

## **Financial Planning Client Discovery Meeting (1.5 hours)**

**Topic:** The Comprehensive Financial Life Planning Process

**Financial Planner:** Sarah Ponder, CFP®

### **Objectives:**

1. Financial planner and potential client(s) have an opportunity to learn about each other.
2. Potential client(s) share their reasons for seeking a financial planner.
3. Financial planner reviews the entire financial life planning process with potential client(s):
  - a. First 3 months
  - b. First year Implementation
  - c. Second year +
  - d. [Example client service calendar](#)
4. Financial planner and potential client(s) thoroughly review all documents:
  - a. [Financial life planning process](#)
  - b. [Financial planning agreement](#)
  - c. [Investment management agreement](#)
  - d. [ADV Part 2](#)
  - e. [Privacy Policy](#)

### **Preparation:**

1. Initial consultation
2. [Asset-Map](#) form and [video](#)
3. Sent documents: ADV, client agreements, privacy policy, financial life planning process

### **Next steps:**

1. Potential client(s) will receive homework from [lifeplanningforyou.com](http://lifeplanningforyou.com)
  - a. [Three questions](#)
  - b. [Heart's core](#)
  - c. [Goal sheet](#)
  - d. [Ideal day / week / year](#)
2. Planner will send electronic agreements and other documents to potential client(s)
3. If client(s) decide to onboard, planner will provide a document vault and [checklist](#)