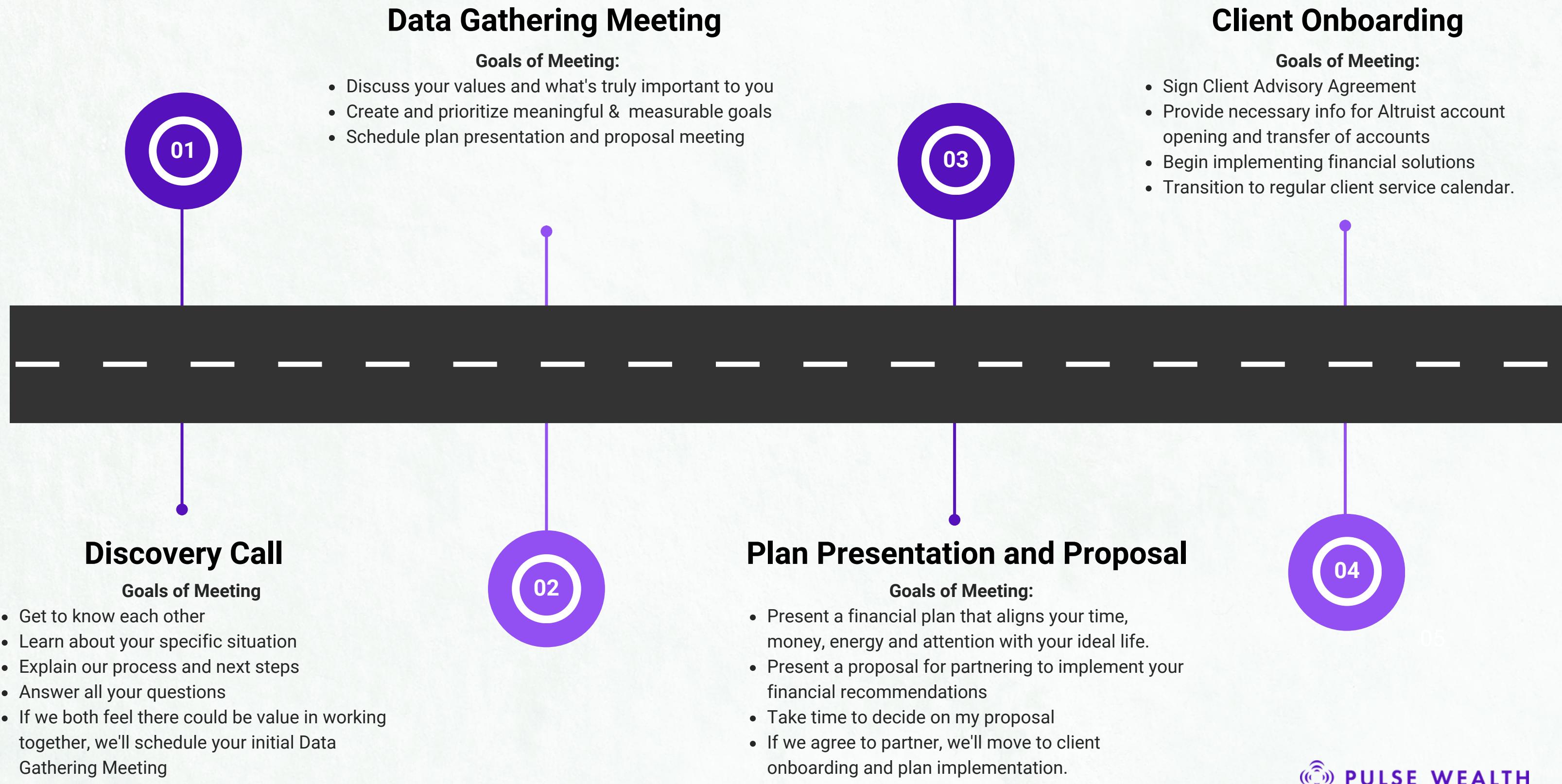


Our Process



Your First Year with Pulse Wealth

Q2: Your Annual Tax & Risk Shield

Focus: Tax optimization and protection review.

Your Todos:

- Upload final tax return once filed
- Confirm insurance coverage amounts (life, disability, umbrella).
- Provide an update on Cash Reserves and Debts
- Schedule Tax & Risk Review Meeting



Q1: Your Financial Reset

Focus: Review, organize, and reset the financial foundation for the new year.

Your Todos:

- Update your goals and vision
- Update us with any changes to salary, bonus, RSUs, or benefits.
- Review spending summary and savings progress from prior year.
- Schedule your Financial Reset Meeting with Pulse Wealth.



Q3: Your Annual Growth Accelerator

Focus: Assess investment alignment and progress toward walk-away goals.

Your Todos:

- Confirm any upcoming commission, RSU, or bonus payments
- Review your “Walk-Away Wealth” projection
- Discuss major purchases, job changes, or family goals before year-end.
- Schedule your Investment & Goal Check-In.

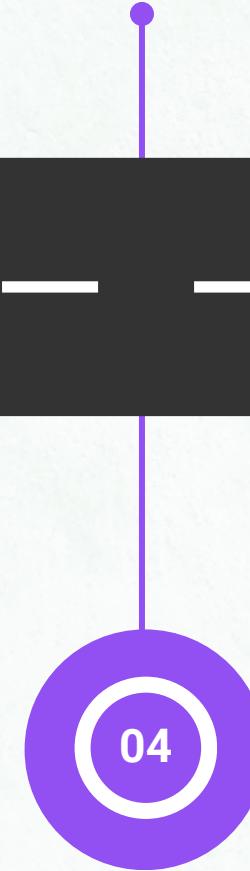


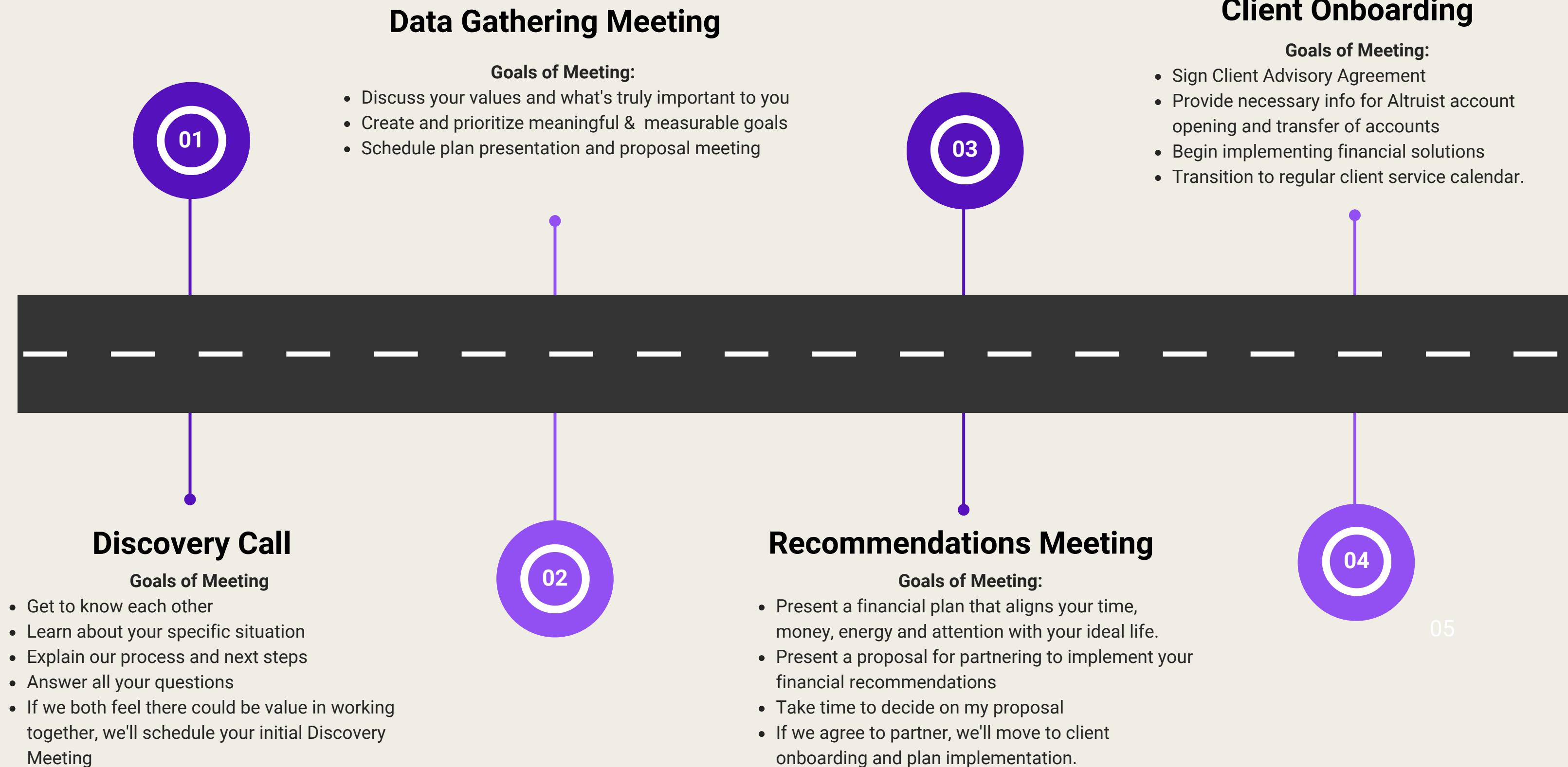
Q4: Your Legacy Builder

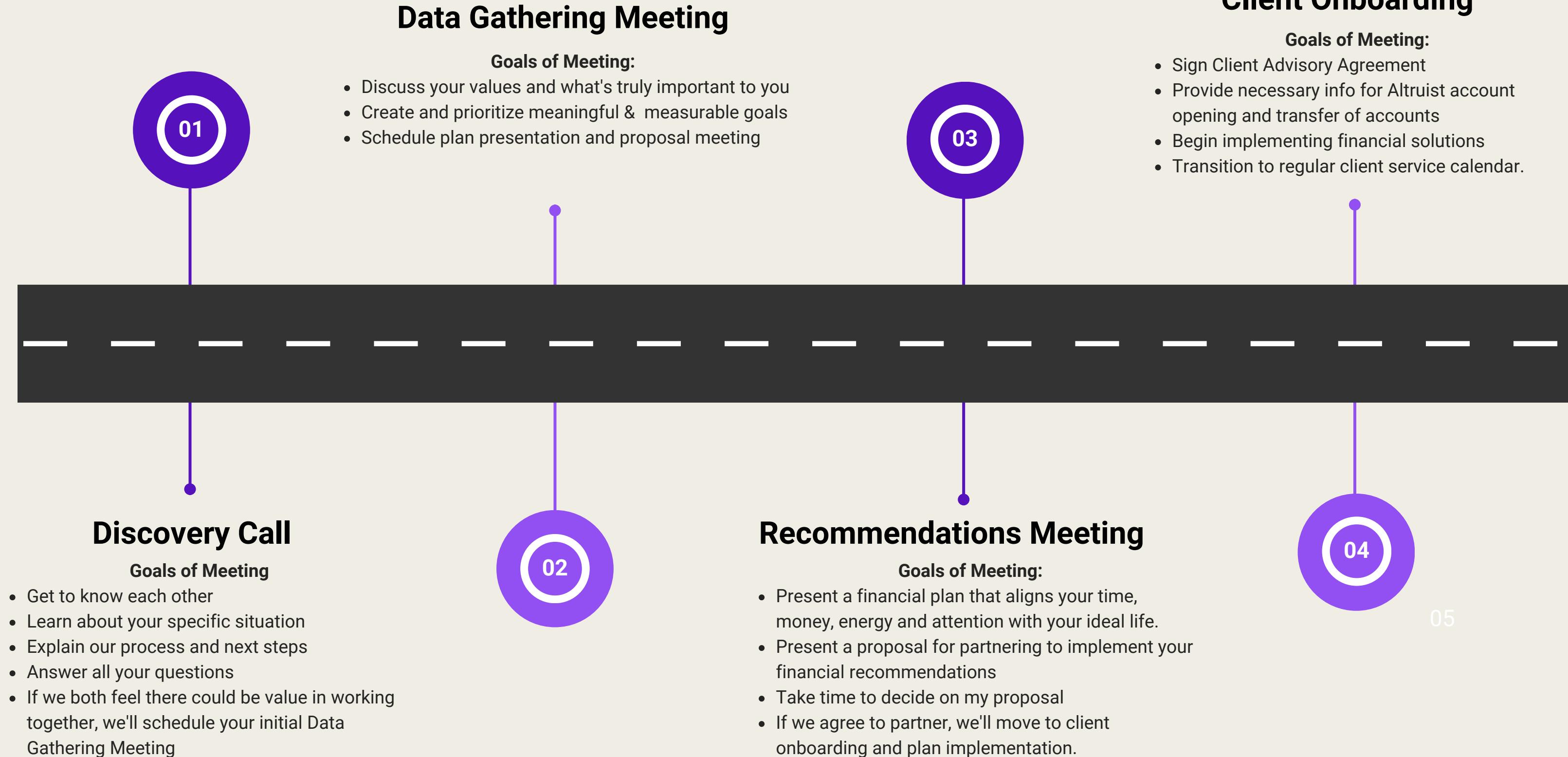
Focus: Finish strong and prepare for next year's opportunities.

Your Todos:

- Confirm year-end income, commissions, and expected tax liability.
- Max out eligible retirement, HSA, and after-tax contributions.
- Review charitable giving and year-end deductions.
- Schedule Year-End Strategy Session to lock in next-year priorities.







Q2: Your Annual Tax & Risk Shield

Focus: Tax optimization and protection review.

Your Todos:

- Upload final tax return once filed
- Confirm insurance coverage amounts (life, disability, umbrella).
- Provide an update on Cash Reserves and Debts



Q4: Your Legacy Builder

Focus: Finish strong and prepare for next year's opportunities.

Your Todos:

- Confirm year-end income, commissions, and expected tax liability.
- Max out eligible retirement, HSA, and after-tax contributions.
- Review charitable giving and year-end deductions.



Q1: Your Financial Reset

Focus: Review, organize, and reset the financial foundation for the new year.

Your Todos:

- Update your goals and vision
- Update us with any changes to salary, bonus, RSUs, or benefits.
- Review spending summary and savings progress from prior year.

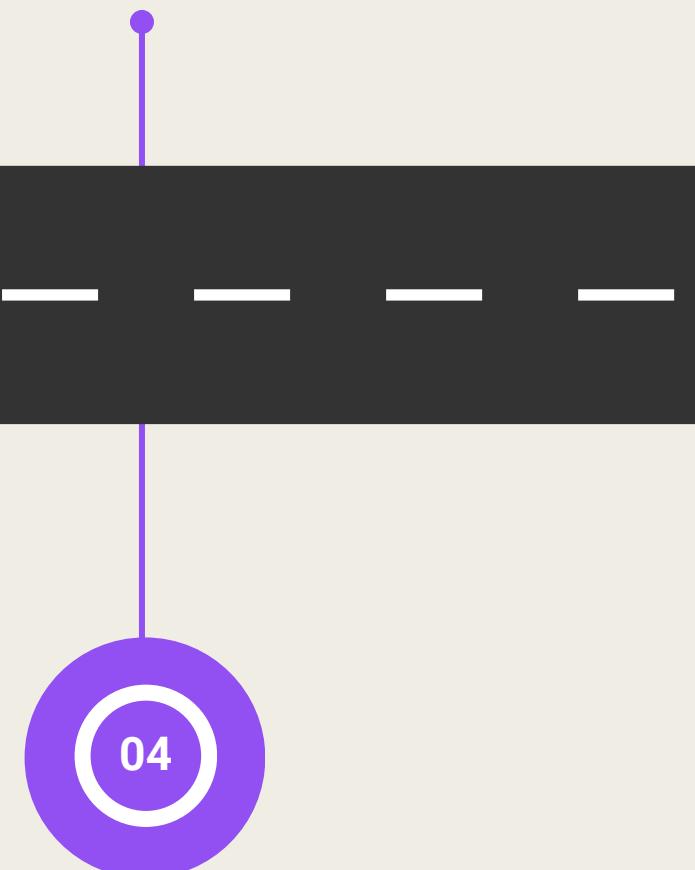


Q3: Your Annual Growth Accelerator

Focus: Assess investment alignment and progress toward walk-away goals.

Your Todos:

- Confirm any upcoming commission, RSU, or bonus payments
- Review your "Walk-Away Wealth" projection
- Discuss major purchases, job changes, or family goals before year-end.



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