Our Process

01 Discovery Call

Goals of Meeting

- Get to know each other
- Learn about your specific situation
- Explain our process and next steps
- Answer all your questions
- If we both feel there could be value in working together, we'll schedule your initial Data Gathering Meeting

02 Data Gathering Meeting

Goals of Meeting:

- Discuss your values and what's truly important to you
- Create and prioritize meaningful & measurable goals
- Schedule plan presentation and proposal meeting

03 Plan Presentation and Proposal

Goals of Meeting:

- Present a financial plan that aligns your time, money, energy and attention with your ideal life.
- Present a proposal for partnering to implement your financial recommendations
- Take time to decide on my proposal
- If we agree to partner, we'll move to client onboarding and plan implementation.

04 Client Onboarding

Goals of Meeting:

- Sign Client Advisory Agreement
- Provide necessary info for Altruist account opening and transfer of accounts
- Begin implementing financial solutions
- Transition to regular client service calendar.

PULSE WEALTH

Your First Year with Pulse Wealth

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.

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

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.

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03 Recommendations Meeting

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