Our Process

01

Introductory 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 Discovery Meeting

02

Discovery 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