PULSE WEALTH

PROSPECTIVE CLIENT PROCESS

1 INTRODUCTORY CALL

Expected Duration: 20-30 minutes

Goals of Meeting

- Get to know each other
- Learn about your specific situation
- Explain our process and next steps
- Answer all your questions

End Result

- If we both feel there could be value in working together, we'll schedule your initial Discovery Meeting If either of us
- feels we aren't the best firm to help you, we'll provide resources or referrals to help you find a better fit.

2 DISCOVERY MEETING

Expected Duration: 45 minutes to an hour

Goals of Meeting

- Discuss your values and what's truly most important to you
- Create and prioritize meaningful and measurable goals for allocating your human and financial capital to achieve the life you want to live.

End Result

- Schedule plan presentation and proposal meeting.

3 PLAN PRESENTATION & PROPOSAL

Expected Duration: 45 minutes to an hour

Goals of Meeting

- Present a financial plan that aligns your time, money, enegery and atttion with your ideal life.
- Present a proposal for partering to implement your financial recommendations

End Result

- Take time to decide on my proposal.
- If we agree to partner, we'll move to client onboarding and plan implementation. if not, we'll share your financial plan to help find the right firm for you.

4 CLIENT ONBOARDING

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