Your journey and goals

DATE
FALL

MEETING
1. Discovery- or Re-Discovery
2. Financial overlay Intro
3. Engagement Roadmap introduction

DATE
WINTER

MEETING
- Mutual understanding review-roadmap formalization
- Implementation Plan
- Data Gathering
- Setting Prioritization
- Family Wealth Planner Discussion -Section 1

DATE
SPRING

MEETING
- Financial Plan Review
- Investment Plan Implementation
- Family Wealth Planner- Section II
- Insurance Implementation
- Estate Plans –Family Planning

DATE
SUMMER

PHONE CALL
- Review Existing Plans
- Roadmap Review
- Family Wealth Organizer – Section III & IV
- Client Satisfaction Review

Sample Client Name Roadmap

2025-2026

MEETING
- Goals, Circumstances & Preferences Review
- Roadmap Review
- Investment Review
- Family Meeting
- ED: Legacy Planning

DATE
SUMMER

MEETING
- Goals, Circumstances & Preferences Review
- Roadmap Review
- Long Term Care Insurance
- ED: International Investing

DATE
SPRING

PHONE CALL
- Goals, Circumstances & Preferences Review
- Roadmap Review
- Disability Insurance
- ED: Fixed Income

DATE
WINTER

MEETING
- Goals, Circumstances & Preferences Review
- Roadmap Review
- Investment Review
- Education Planning
- ED: US Equities

DATE
FALL

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Add text

DATE
WINTER

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DATE
SPRING

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DATE
SUMMER

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Sample Client Name Roadmap

2025-2026

Add text

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DATE
SUMMER

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MEETING
1. Discovery- or Re-Discovery
2. Financial overlay Intro
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MEETING
- Mutual understanding review
- Implementation Plan
- Data Gathering
- Setting Prioritization
- Family Wealth Planner Discussion begin -Section 1

Sample Client Name Roadmap

2025-2026

MEETING
- Goals, Circumstances & Preferences Review
- Roadmap Review
- Investment Review
- Education Planning
- ED: US Equities

DATE
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MEETING
- Goals, Circumstances & Preferences Review
- Roadmap Review
- Investment Review
- Family Meeting
- ED: Legacy Planning

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Sample Client Name Roadmap

2025-2026

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Wealth Management Topics – Wealth Wellness Wheel

Below is a list of topics you can use as a guide when building your client's roadmap. The topics should always align with their goals and desired outcomes.

FAMILY AND RELATIONSHIPS

- ❑ Create/Update my Will
- ❑ Concerned about protecting
- ❑ Plan for unexpected events
- ❑ Plan for a wedding
- ❑ Fund education expenses
- ❑ Organize family meeting to discuss my plan
- ❑ Educate my children on wealth matters
- ❑ Prepare my heirs for wealth transfer
- ❑ Plan my funeral/celebration of life
- ❑ Create/update my Power of Attorney
- ❑ Care for children or dependents
- ❑ Care for parents/elders
- ❑ Start or grow my family

SUB TOPICS

- ❑ Financial needs assessment
- ❑ Liquidity analysis
- ❑ Insurance review
- ❑ Life insurance trusts review
- ❑ Planning for special needs
- ❑ Equitable distribution planning
- ❑ Estate Planning goals
- ❑ Survivor income goals
- ❑ College/Education goal plan implementation
- ❑ Family Planner creation
- ❑ Child care directives
- ❑ Health Care directives

HEALTH AND WELLNESS

- ❑ Maintain/start a health and active lifestyle
- ❑ Plan for my long-term care
- ❑ Plan for incapacity
- ❑ Maintained activities, club memberships

SUB TOPICS:

Lifestyle Insurance Review

DISABILITY INSURANCE PLANNING

- ❑ Disability income goals
- ❑ Disability income sources
- ❑ Disability planning implementation
- ❑ LTC education and review

COMMUNITY AND GIVING

- ❑ Support a worthy cause/charity
- ❑ Set-up a foundation
- ❑ Join a non-profit board
- ❑ Volunteer

SUB TOPICS:

- ❑ Charitable giving plan creation and implementation

OTHER

- ❑ Pursue my next life passion
- ❑ Other

LIFESTYLE AND LEISURE

- ❑ Plan vacations and travel
- ❑ Maintain my current lifestyle
- ❑ Plan for my retirement lifestyle
- ❑ Move, relocate or downsize
- ❑ Protect or invest in collectibles
- ❑ Purchase a second home/cottage
- ❑ Purchase an investment property
- ❑ Buy something special

SUB TOPICS

Investment Management

- ❑ Risk tolerance assessment
- ❑ Asset allocation review
- ❑ Asset location & Sources of capital review
- ❑ Asset transfer implementation
- ❑ IRA accounts/rollovers
- ❑ Investment review
- ❑ Taxable accounts review
- ❑ Investment implementation
- ❑ Portfolio rebalancing
- ❑ Annuity review & Education
- ❑ Saving strategy implementation
- ❑ Retirement income investing

Income Planning

- ❑ Sources of survivor income
- ❑ Survivor income solutions
- ❑ Distribution strategies
- ❑ Sources of retirement income
- ❑ Retirement Benefits review
- ❑ Essential Expense Review
- ❑ Contingency income Education and Planning

CAREER AND WORK

- ❑ Take a sabbatical
- ❑ Change/advance my career
- ❑ Plan for maternity/paternal leave
- ❑ Start a business
- ❑ Sell or transfer my business
- ❑ Expand my business
- ❑ Protect my business
- ❑ Incorporate my business/practice

SUB TOPICS

BUSINESS PLANNING

Start or Expand my business:

- ❑ Business planning goals
- ❑ Owner benefits
- ❑ Owner needs assessment
- ❑ Owners meeting

Sell or transfer my business

- ❑ Business succession choices
- ❑ Owner benefits – retirement

Protect my business

- ❑ Risk management assessment
- ❑ Property and casualty/liability review
- ❑ Overhead expense coverage assessment
- ❑ Key person review
- ❑ Employee benefits Assessment & Review
- ❑ Employee benefits review
  - ❑ – group health, Life, Disability, LTC
- ❑ Owner benefits review
- ❑ – life. Disability, LTC

Important Information

Please remember that all investments carry some level of risk, including the potential loss of principal invested. They do not typically grow at an even rate of return and may experience negative growth. As with any type of portfolio structuring, attempting to reduce risk and increase return could, at certain times, unintentionally reduce returns.

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