CLIENT ROADMAP

1. Pre-Discovery: Receive client onboarding email, establish client portal for secure file sharing, gather initial data, schedule Discovery meeting.

2. Discovery Meeting: Perform needs analysis, establish objectives and goals, document commitments.

3. Post-Discovery: Sign written engagement agreement, collect any relevant deposit, review welcome package.

4. Pre-Delivery: Complete specific requests and document checklists. Accept invitation to Delivery meeting 1-2 weeks after receipt.

5. Delivery Meeting: Review data analysis and presentation of plan. Schedule 3-month follow-up after implementation.

6. Three-Month Follow-Up: Review implementation, confirm goals and objectives, and perform additional needs analysis.

7. Ongoing: Periodic check-ins according to service level, end-of-year tax planning, and annual review.