

Your Journey with Prospera



Title	Topics	Action Steps
<u>Initial Discovery Meeting</u>	Your Story, Your Strategy Risk Assessment	This meeting is all about getting to know you. We ask you to complete two questionnaires that help us understand your situation and your comfort level with risk.
<u>Initial Planning Meeting</u>	Goal Setting Questionnaire Connected Planning Topics Resource Income Lab Planning Platform Snug Legacy Platform	This meeting is focused on setting up the baseline picture of your current situation. We strive to understand your goals and build your financial statements.
<u>Strategy Implementation</u>	Prospera Investment Management Connecting Your Finances with Planning	In this meeting, we will review the recommendations and begin implementation of the strategies that align with your unique goals, finances and risk tolerance.

At Prospera Investment Advisors, we believe great financial planning begins with a clear understanding of who you are, where you've been, and where you'd like to go. Our client journey is designed to guide you through a series of three purposeful meetings: to get to know you and your goals, build a personalized financial plan, and put thoughtful strategies into action. Along the way, we'll provide helpful questionnaires and resources to support you—from day one to every step forward. This process is all about helping you feel confident and clear as we shape a plan that reflects your values, priorities, and vision for the future.

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