OUR CLIENT-ADVISOR MATCHMAKER PROCESS

Brescor Wealth is an independent RIA that provides wealth management for individuals and families. Before getting started, we have three (3) questions we'd like to ask you:

- **Are you a Healthcare Professional or an immediate family member of one?**
- **Are you interested in any of our wealth management services (financial planning, investment management, and personal finance coaching)?**
- **Are you interested in forming a client-advisor relationship that focuses on bettering financial wellness through greater financial freedom and stability?**

If you answered "YES" to these questions, then let's keep going!

For those who are not quite sure if Brescor Wealth is a good fit for them, please know that there is ***no cost or obligation*** to go through this matchmaker process with us. We want you to be confident with your decision. Brescor Wealth is committed to providing deep value for every dollar that you will pay us. We are a "Client ROI-minded" firm, meaning we seek to provide high-quality solutions and a client experience worth multiples beyond the fees.

Step 1 – FREE Financial Wellness Consultation

Before we both commit significant time to each other, let's schedule a 30-minute Zoom call to make sure your needs and goals can be met by our expertise and experience. We will ask you several questions about your financial situation, family situation, worries, and dreams. Most of the time, we will simply **LISTEN**. We want to hear your story and then honestly explain how we might fit into it.

If we aren't a good fit, then we'll happily introduce you to a firm who might be!

Step 2 – Review Notes & Ask Questions

We will provide you the notes from the **FREE** Financial Wellness Consultation to review. If you have other questions or issues that we didn't have time to discuss during the consultation meeting, then we encourage you to email us with that information. Ask us **ANYTHING** you want. This is not the time to be shy!

Step 3 – Proposal

If you feel comfortable with what you've learned about Brescor Wealth so far, then request that we put together a proposal that includes solutions-based services and pricing. We will email this to you within 3 business days of the request.

Step 4 – Review Proposal & Ask More Questions

Our proposal is a working draft, and we **EXPECT** that you'll have questions, concerns, or other needs that might need to be integrated into the proposal. After reviewing the proposal, we give you the option to either email this information to us or schedule another **FREE** Zoom meeting. We prefer the latter. Why? Before finalizing the proposal, we want one last chance to discuss how Brescor Wealth can provide deep value by addressing the fundamental matters affecting your financial wellness. We will ask you:

- **Are you concerned about budgeting and cash flow?**
- **Are you overpaying your taxes?**
- **Are you and your loved ones protected if something happens to you?**
- **Are you concerned about your ability to meet long-term financial goals?**
- **Are you taking steps to invest in a happy and healthy retirement?**
- **Are you waking up in the morning, confident that you are proactively working on your financial wellness?**

Step 5 –Take a Breath

After answering your questions and addressing your concerns, we'll provide a finalized proposal for signature. Now, we get it – this is an important decision! Take a moment to reflect. **SLEEP ON IT.** Don't rush the decision, but don't procrastinate either! We know you are interested in doing bigger and better things with your finances, so it's worth taking action sooner rather than later. Ask yourself:

- **Do I like, trust, and respect the team at Brescor Wealth?**
- **Will the benefits they provide exceed their cost?**
- **Do I like their process, investment philosophy, and communication style?**
- **Do the services included in the proposal make sense for me?**

When ready, let us know how you'd like to proceed!

Step 6 – Sign Proposal & Set Our First Meeting

If you are ready to start a journey to better financial wellness with Brescor Wealth, then we'll co-sign the finalized proposal. Congratulations! We are so excited! Now, **LET'S GET TO WORK**. We'll send you a detailed request for more information and documentation, and we'll also invite you to set up our next meeting, which will be a **DEEP DIVE** into your financial life. Welcome to Brescor Wealth!