OUR CLIENT-THERAPIST MATCHMAKER PROCESS

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

- **Do you believe that how we feel about money is just as important as what we do with it?**
- **Are you open to exploring the beliefs and habits that might be affecting your financial decision-making?**
- **Would you like to feel more peace of mind and confidence when it comes to your finances?**

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 **FREE** 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 dynamics, 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.

Step 2 – Review Notes & Ask Questions

We will provide the notes from our **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 let us know and we will put together a proposal that includes pricing. We will email this to you within a business day of the request.

Step 4 – Review Proposal & Ask More Questions

We **EXPECT** that you'll have questions and concerns after reviewing the proposal. We invite you to email this information to us. We want one last chance to discuss how Brescor Wealth can provide deep value by addressing the fundamental matters affecting your financial wellness. We might ask you:

- **Are you overspending?**
- **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. We don't want you to rush a decision, but we don't want you to procrastinate either! We know you are interested in improving your financial health, so it's worth acting now. Take a breath, and ask yourself:

- **Do I like, trust, and respect us?**
- **Do I know that the benefits received will exceed the cost?**
- **Do I like our process, financial philosophy, and communication style?**
- **Do the services included in the proposal make sense for me?**

When ready, let's 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 settle on an ideal date and time for our next meeting. **CONGRATULATIONS!** Welcome to Brescor Wealth!