

## OUR PROCESS BUILDS CLARITY

### 1. INITIAL EXPLORATION MEETING

- **Your introduction to BluePrint Financial Planning.**

#### LISTEN

At your initial exploration meeting, our purpose is to get a clear understanding of you. We will talk about your values, relationships, goals, and career.

How are you spending your time now, and how do you want to spend your time ten years from now? What are your family's needs, and what are your obligations?

After we have discovered more about you, we will request documents to help us evaluate your current financial situation and look at formulating a long-term financial plan.

### 2. WEALTH MANAGEMENT PLAN PRESENTATION

- **We will present recommendations for your personal wealth management plan.**

#### PLAN

At your second meeting, we will share our recommendations based on your needs, goals, and current situation.

Our Goal Planning and Monitoring process gives you a picture of your probability of success for reaching your goals in the future. You can then visualize different scenarios: retirement contributions post tax or pretax? Retiring two years earlier? Buying a vacation home or turning your hobby into a job? It will be customized to help you reach major milestones: The ones you know are coming, and perhaps a few you have not yet considered.

This step in our process is where we simplify the complex and help clarify your situation.

### 3. SERVICE COMMITMENT & IMPLEMENTATION

- **Implementation.**

#### EXECUTE

Preliminary implementation of your wealth management plan is our final onboarding step. This involves opening your Raymond James accounts and transferring in assets, if appropriate. It includes setting up income or contributions. It may be establishing a retirement plan for your business.

This is just the start of your relationship with BluePrint Financial.

Your comprehensive plan will continually evolve with changes in your family, career, and stage of life. Your health can also have an impact. And is not just you that changes over time; we will adjust with the markets, economy, and tax legislation.

Investment advisory services offered through Raymond James Financial Services Advisors, Inc. BluePrint Financial Planning is not a registered broker/dealer and is independent of Raymond James Financial Services. Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. You should discuss any tax or legal matters with the appropriate professional. Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER AND CFP® in the U.S. The projections or other information generated by Goal Planning & Monitoring regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Goal Planning & Monitoring results may vary with each use and over time.