BluePrint FINANCIAL PLANNING
MORE THAN JUST INVESTING
KIEL VANDERVEEN, CFP®

Our personalized four-step process provides a strong foundation for establishing long-term professional relationships. We invest the time to make sure your financial goals are understood and that your personal wealth management plan works towards those goals.

INITIAL EXPLORATION MEETING	WEALTH MANAGEMENT PLAN PRESENTATION	SERVICE COMMITMENT & IMPLEMENTATION	REGULAR PROGRESS MEETINGS
• Introduction to BluePrint Financial Planning • Assessment of current financial well-being • Discussion of goals • Discuss risk versus reward	• Create and agree on a guiding investment policy statement • Present recommendations and overall wealth management plan • Discuss the next steps	• Execute your recommended plan with the proper paperwork • Walk through services, including online access; set up communication preferences.	• Review actions taken, statement review • Annually, semi-annually or quarterly as needed • Review investments and financial plan; assess progress and recommend adjustments
Step 1	Step 2	Step 3	Step 4
WHY WE DO IT:	**WHY WE DO IT:**	**WHY WE DO IT:**	**WHY WE DO IT:**
• Establish goals • Understand your situation • Assess if we can add substantial value to your situation	• Allows us to clearly picture your specific beliefs about investing • Allows you time to digest the plan before implementation	• Begin to adopt personal financial plan • Set expectations for meetings and updates	• Ensure implementation of financial plan is successful. • Monitor progress and reprioritize when necessary to realize financial goals • Begin advanced planning addressing risk management, wealth preservation, tax mitigation, and retirement income planning

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