BluePrint
FINANCIAL PLANNING

KIEL VANDERVEEN, CFP®
COLE SHARP, 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.

1. INITIAL EXPLORATION MEETING	2. WEALTH MANAGEMENT PLAN PRESENTATION	3. SERVICE COMMITMENT & IMPLEMENTATION	4. REGULAR PROGRESS MEETINGS
• Introduction to BluePrint Financial Planning • Assessment of current financial position • Discuss risk versus reward	• Create and agree on goals you want your investments to be working towards • Present recommendations and overall wealth management plan • Discuss the steps to implementation	Execute your recommended plan: • Paperwork for Raymond James accounts • Discuss process additional financial adjustments.	• Review actions taken, statement review • Annually, semi-annually or quarterly as needed • Review investments and financial plan; assess progress and recommend adjustments
Why We Do It	**Why We Do It**	**Why We Do It**	**Why We Do It**
• Begin to understand and frame your goals • Assess if we can add substantial value to your situation	• Allows us to clearly picture your beliefs about investing, your goals, and your values • Allows you time to digest the plan before implementation	• Begin to adopt personal wealth management plan • Set expectations for meetings and communicating important updates	• Ensure implementation of financial plan is successful • Monitor progress and reprioritize when necessary
What We Need from You	**What We Need from You**	**What We Need from You**	**What We Need from You**
Gather documents from the list, and email or mail back before Step 2.	Gather personal information needed to open accounts (beneficiary information, trust documents, most recent investment statements for transfer) and email or mail back before Step 3.	Implement action items for advanced planning. For example, 401k allocation adjustments, change tax withholding. Set up online access, if desired, discuss best days and times for regular progress meetings.	Keep us informed about any major events or updates. Moving, new children or grandchildren, a health crisis, a job change, or retirement plans can all effect your financial plan.

402-873-0530 · bpfinancialplanning.com · 1720 S 11th St · Nebraska City, NE 68410