BluePrint FINANCIAL PLANNING

MORE THAN JUST INVESTING

KIEL VANDERVEEN, CFP®
COLE SHARP, CFP®
ADAM HOWARD, FINANCIAL ADVISOR

OUR PROCESS BUILDS CLARITY

1. INITIAL EXPLORATION MEETING	2. WEALTH MANAGEMENT PLAN PRESENTATION	3. SERVICE COMMITMENT & IMPLEMENTATION
• **Your introduction to BluePrint Financial Planning.**	• **We will present recommendations for your personal wealth management plan.**	• **Implementation.**
LISTEN	**PLAN**	**EXECUTE**
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.	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.	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.

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CORE INVESTMENT MANAGEMENT

- ✓ Basic Goal Planning and Monitoring
- ✓ Risk Tolerance
- ✓ Asset Allocation
- ✓ Portfolio Performance
- ✓ Annual Meeting

FINANCIAL PLANNING

- ✓ CPA Coordination
- ✓ Retirement Needs
- ✓ Tax Mitigation Strategies
- ✓ Distribution Strategies
- ✓ Education Funding Strategies
- ✓ Survivor Needs/Life Ins. Analysis
- ✓ Disability Coverage Analysis
- ✓ Long-Term Care Planning
- ✓ Estate Planning Summary
- ✓ Social Security Planning

- ✓ Goal Planning and Monitoring
- ✓ Risk Tolerance
- ✓ Asset Allocation
- ✓ Portfolio Performance
- ✓ Semi Annual Meeting

WEALTH MANAGEMENT

- ✓ Attorney Coordination
- ✓ Gift Planning
- ✓ Trust Integration
- ✓ Charitable Giving Tax Strategies
- ✓ Medicare/Health Care Assistance
- ✓ Private Banking*

- ✓ CPA Coordination
- ✓ Retirement Needs
- ✓ Tax Mitigation Strategies
- ✓ Distribution Strategies
- ✓ Education Funding Strategies
- ✓ Survivor Needs/Life Ins. Analysis
- ✓ Disability Coverage Analysis
- ✓ Long-Term Care Planning
- ✓ Estate Planning Summary
- ✓ Social Security Planning

- ✓ Goal Planning and Monitoring
- ✓ Risk Tolerance
- ✓ Asset Allocation
- ✓ Portfolio Performance
- ✓ Quarterly Contact

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