

Your Financial Firm Name Here

**Client Experience Timeline: Phase 1**



**Goals Meeting:**

* Where do you want to go?
* When do you want to get there?
* What do you want your journey to look like?

**Plan Delivery Meeting:**

* Review our Analysis
* Present Recommendations
* Create Action Plan
* Can be 1 to 2 meetings

**Data Gathering:**

**Collect your financial data**

**Day 1**

**Day 90**

**Day 180**

**Day 270**

**Day 365**

**Getting Started:**

Introduction to our process

**Implementation & Onboarding:**

Setting your plan into action

**Day 30**

**Day 60**

**Customized Video**

**Client Action**

**Client Meeting**

**Prepare for Annual TrailMarker:**

* Review Goals
* Update financial data
* Schedule meeting

**Personal Podcast:**

Accountability Check-in

**Personal Podcast:**

Accountability Check-in

**Enter Phase 2**

**Personal Podcast:**

Accountability Check-in