



TrailWise Financial Partners

Client Experience Timeline: Phase 1



Client Meeting



Client Action



Customized Video

Find Your Path Meeting:

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



Day 30

Plan Delivery Meeting:

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



Day 60

Implementation & Onboarding:

Setting your plan into action



Day 90



Personal Podcast:

Accountability Check-in

Data Gathering:

Collect your financial data



Day 1



Welcome to the Lodge:

Introduction to your Personal Finance Website

Prepare for Annual TrailMarker:

- Review Goals
- Update financial data
- Schedule meeting



Day 365

Day 270



Personal Podcast:

Accountability Check-in

Day 180



Personal Podcast:

Accountability Check-in

Enter Phase 2