Money Roadmap Navigator
Year #1 Service Calendar

CREATE & DESIGN

Q1 Onboard	**Q2 Evaluate**	**Q3 Plan**	**Q4 Launch**
1 meeting (1hr)	*1 meeting (1hr)*	*1 meeting (1hr)*	*Check in/Follow Up*
• Create Financial Statement & Spending Plan • Identify Financial Goals	• Model Money Roadmap Scenarios • See Goals in Action	• Building Money Roadmap	• Tracking Progress • Attend Educational Webinars • Use Advisor Hotline
1 or 2 Main topics to work on for next quarter	**1 or 2 Main topics to work on**	**Taking Steps**	**Finish Yr #1**
• Identify Client's Key Priorities • Identify Financial Planning Areas	• Review Client's Key Priorities • Identify Next Financial Planning Areas	• Work Thru Client's Key Priorities • Discuss Recommendations	• Close out Action List Items • Review Implemenation Progress
Create "Homework" List & Action Items	**Action List Review & Update**	**Working Thru Action Items**	**Create Action Items for Year #2**

Money Roadmap Navigator
Year #2+ Service Calendar

MONITOR & FOLLOW UP

Review	**Plan**
1 meeting (1hr)	*1 meeting (1hr)*
• Financial Wellness Review • Attend Educational Webinars	• Comprehensive Plan Review
• Goals & Milestones Review • Progress Satisfaction Discussion • Tackle Roadblocks • Financial Topics Checklist	• Money Roadmap Review • Goals/Milestones Review • Financial Statement Update • Spending Plan Review • Insurance Review • Porfolio Assessment
Get Stuff Done	**Create Actions Items for the Year #3**

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FINANCIAL PLANNING

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