

# Square Peg Financial Advisory Services Financial Planning Process

## [1A] Getting Acquainted

- If agreed, you receive proposal and fee quote.
- If proposal and fee agreed, proceed to planning engagement.

## [1B] Engagement

- Sign Planning Agreement
- Estimate milestones and completion date.

## [2] Discovery

- We discuss managing your money considering your values, priorities, experience and life conditions.
- Follow up with a list of statements and other data to provide for analysis.

## [3] Analysis

- Lots of work “back at the office” assessing your financial strengths, challenges and opportunities.
- This is a collaborative activity with check-ins and requests for clarifying information.
- We develop your plan.

## [4] Presentation

- Preliminary presentation meeting for gut reactions and final adjustments to goals and strategies.
- Plan delivery meeting soon after preliminary meeting. Receive bound copy, review key findings, and walk through recommendations.

The financial planning engagement concludes. If you engage Square Peg FAS to implement your plan recommendations, accounts are opened with new disclosures and agreements. [See the plan implementation infographic.]