New Client Intake Process

ALLODIUM®
INVESTMENT CONSULTANTS

INDIVIDUAL INVESTORS – WEALTH MANAGEMENT

1 VALUES MEETING

OUR PURPOSE:
Determine if we may be a match

Meeting duration: 1 hour

WHAT WE DO:
- We learn what's important to you
- We learn why you are seeking an advisor

WHAT YOU DO:
- You learn about our investment philosophy
- You learn how we are compensated

2 DIAGNOSTIC MEETING

OUR PURPOSE:
Understand you and your financial goals

Meeting duration: 2 hours

WHAT WE DO:
- We ask questions to learn your story (goals, family, background, work, etc.)
- We assess your risk profile

WHAT YOU DO:
- You provide your financial documents
- You share your financial goals

3 PROPOSAL MEETING

OUR PURPOSE:
Share the investment proposal with you

Meeting duration: 2 hours

WHAT WE DO:
- We present your investment proposal and financial planning opportunities
- We explain fees and any tax implications

WHAT YOU DO:
- You ask questions
- You are able to request modifications to the proposal

4 IMPLEMENTATION MEETING

OUR PURPOSE:
Align and initiate your investment strategy

Meeting duration: 2 hours

WHAT WE DO:
- We clarify any investment strategy modifications
- We gather your communications preferences

WHAT YOU DO:
- You confirm your investment plan
- You sign implementation paperwork

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