Plan *to* Live

The Fischer Wealth Client Experience

Our clear process to help build new relationships

Step 1: Initial Meeting
- Learning about you, how you value money & what's important to you
- Understanding any special concerns/challenges that worry you
- Learning how we can add value
- Outline our Plan to Live and investment selection process
- Gather statements and documents

Step 3: Second Meeting
- Presentation of your Plan to Live, Family Index Number, income timeline and detailed investment strategy
- Discussion of our value proposition and management fees
- Outline our concierge onboarding process including logistics, tax awareness and paperwork completion

Step 5: First Statement Meeting
- Review first monthly statement
- Set up secure online account access and discuss online resources
- Establish frequency of future Plan to Live ongoing reviews
- Required Minimum Distribution planning
- Schedule beneficiary/comprehensive estate planning

Step 7: Ongoing Review Process
- Review investments: risk/return relative to peer group/asset class, tax efficiency, cost effectiveness
- Review portfolio performance
- Keeping up to date on life changes/milestones, travel plans and changing needs

Day 1
First Step | 5-7 Days | 7-10 Days | 10-20 Days | 45 Days | 60-90 Days | Ongoing Reviews

Step 2: Develop your Plan to Live
- Establish your Family Index Number
- Develop your income timeline
  - Uncover and coordinate potential income sources (including RMD) and tax liability
  - Determine longevity of income sources
- Analyze current investments: risk/return to peer group and cost effectiveness

Step 4: Concierge Onboarding Process
- Sign prepared documents to open accounts and transfer existing assets
- Implement investment strategy
- Set up income direct deposits (if applicable)

Step 6: Beneficiary/Advanced Planning
- Discuss family dynamics, beneficiaries & transitional planning to next generation
- Estate planning, i.e., living trust, POA, etc.
- Introduce long term health care strategies
- Charitable giving strategies
- Concentrated position planning
- Discuss coordination with CPAs/Attorneys

Fischer Wealth Management ~ 3312 E SR 436 ~ Apopka, FL 32703 ~ (407) 260-8386

www.fischerwealth.com