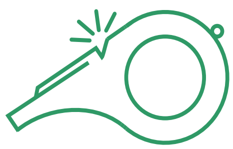
HESPERIAN *Wealth*

Our Planning Process

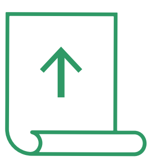
It starts with deeply understanding *you*.
Only with that foundation can we make the proper recommendations.

Our approach to financial planning involves a five- to seven-week process:



WEEK 1 **Kickoff Meeting** | 60 MIN.

We'll help you draft a *Dream Statement*—your vision for the future in your own words. This document will guide everything we do together.

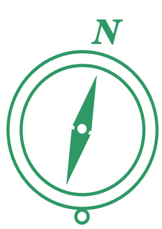


WEEK 2 **Fact-Finding Week**

Take the week to submit your financial information through our secure Client Portal and Planning Vault. We'll also send you some short (and hopefully fun) questionnaires to complete.

WEEK 3 **Analysis Week**

There's nothing for you to do this week unless you have additional questions. We will analyze everything you've submitted and prepare ideas that address your goals and dreams.



WEEKS 4–6 **Exploratory Workshops** | 60 MIN. EACH

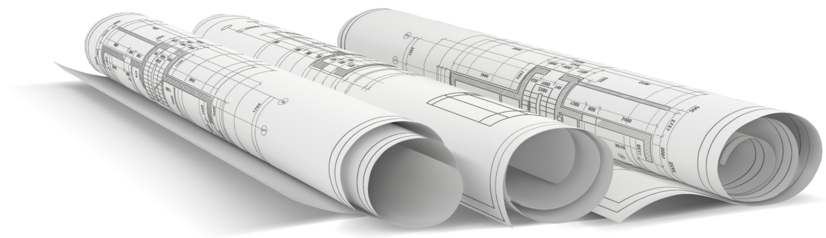
Over one to three meetings, we'll walk through different scenarios together using our interactive software and develop strategies to achieve the future outlined in your *Dream Statement*.

WEEK 5, 6, or 7 **Plan Delivery**

We'll send you digital access to your comprehensive initial financial plan. We'll also confirm the decisions made and priorities set in the Workshop(s) so we're clear on next steps, what we call Action Items.

Monitoring, Implementation & Updating

Your financial plan is a living document that we'll update together over time. So once we agree on an initial plan, your quarterly subscription begins. Each quarter, we'll review your progress toward your goals and help you implement Action Items. If we see you need help or a reminder, we'll reach out to keep you on course. We can also meet and help you revise your plan whenever you experience a major life event or your financial goals change.



Want to learn more?

We offer a free, no-obligation Discovery Meeting. This is the time for us to get to know each other and discuss our planning process in more detail. We invite you to book one using the link below when you're ready:

SCHEDULE

Or contact us:

eric@hesperianwealth.com

(916) 546-5203