FINANCIAL LIFE FOCUS
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What To Expect At Our First Meeting

Our first meeting is all about whether we're a good fit for you.

It's your opportunity to tell us about you—what you value most in life and what you want for your future. We want to hear *your story*. We want to understand your expectations and define what would make a great long-term relationship.

We'll ask you some questions about your financial life satisfaction today—and if you have a spouse or partner, we'll expect you both to share so everyone gets heard. We want to explore the areas of your life that give you the most satisfaction—and those that are works in progress.

Of course that cuts both ways. You'll be able to ask us any questions you like—we want to give you a preview of what it would be like with us on your team.

That's a lot to talk about in a first meeting.

So you don't need to share any financial information until you're comfortable and ready.

At the end of our session, you get to decide whether—and when—to move forward. We've had clients say yes a few minutes in and we've had some wait three years to hire us. It's all good.

We'll be ready when you are.