Your First 90 Days

Our process is designed to be structured, collaborative, and intentional. From your first conversation through implementation, each step builds on the last to create clarity, confidence, and a coordinated financial strategy based on data and driven by your needs.

Phase I: Introduction & Alignment (Prospect Stage)

What You Receive After Scheduling Your Complimentary Introductory Conversation:

- This roadmap.
- Financial planning checklist.
- Secure digital portal access (for disclosures and optional document uploads).
- Access details for reaching your Adviser to schedule conversation or appointments, or just to reach out with questions.

If you are able to complete the checklist in advance, we can tailor the conversation more specifically to your situation.

Introductory Conversation (Complimentary)

A relaxed, no-pressure meeting to understand your current situation, priorities, and whether we can provide meaningful value.

Following our conversation, we provide access to our advisory agreements for your review. We encourage thoughtful consideration and follow up approximately one week later if we have not heard from you. Once agreements are signed, we move to the next step in the process.

Phase II: Discovery & Strategic Design (Client Onboarding Begins)

This phase typically spans 6–8 weeks, with meetings spaced approximately 2–3 weeks apart, as your schedule allows.

Strategy Session I: Financial Snapshot & Vision

Before this meeting, we request:

- Completed financial planning checklist.

- Supporting statements and documents.
- Prior-year tax return.
- Completion of assessment and risk questionnaire (if applicable).

During this session, we:

- Review your current financial position.
- Clarify goals and priorities.
- Begin outlining strategic opportunities.
- Discuss potential directions for your short and long-term strategies.

Strategy Session II: Scenario Analysis & Education

Between meetings, our team develops alternative planning scenarios to evaluate your options.

During this session, we:

- Present and compare strategic alternatives.
- Discuss trade-offs and long-term implications.
- Analyze current investment structure and discuss improvements (if appropriate).
- Refine your overall direction.

If onboarding occurs during September to November, year-end tax planning will also begin in this phase.

Strategy Session III: Plan Finalization & Coordination

In this meeting, we:

- Present your completed financial plan.
- Outline clear priorities and goals for the year.
- Confirm strategic direction.
- Prepare for account transitions and portfolio implementation.

Phase III: Implementation & Activation

Implementation Session: Portfolio Activation & Execution

We:

- Open and coordinate investment accounts.
- Transition or roll over assets as needed.

- Implement your portfolio strategy in a disciplined manner.
- Establish clear expectations for the year ahead.

Investment implementation may begin during this phase or immediately following it, depending on your timeline and account structure.

Communication & Expectations

During your first 90 days, you can expect:

- Meetings approximately every 2–3 weeks as your schedule allows.
- Email updates and secure portal notifications with progress made on execution of your plan.
- Clear guidance at each step of the planning process.

You will also have ongoing access to our team for questions or clarification, not just during onboarding, but throughout our relationship. Open communication is vital to your success with Next Play Wealth.

The first 30 days require meaningful document gathering and collaboration; this early effort allows us to provide accurate, tailored, and coordinated recommendations. The work done upfront creates long-term clarity.

What You Should Feel After 90 Days

By the end of this process, you should feel:

- Informed about your options.
- Confident in your direction.
- Optimistic about what lies ahead.
- Supported by a structured and disciplined team and process.

Most importantly, you will have a clear, actionable game plan: the foundation for everything that follows.