



# THANK YOU FOR TAKING THE TIME TO MEET WITH US BELOW IS A ROADMAP FOR OUR NEXT FEW WEEKS TOGETHER



## Discovery Meeting: a conversation – no documents needed

- Why are we meeting
- Understand where you are today; where do you want to go
- Your questions for us

## Initial Solutions Meeting: what to focus on over next 12 months

- Balance sheet review
- Projections and guesses around goals
- Recommended first steps and investment process
- Cost

## Mutual Commitment Meeting: as necessary – is it a fit

- Set next 12 months expectations
- Execute documents
- Begin mutual introductions to outside advisors (CPA, etc.)