Getting started with ABW is easy. Whether we meet face to face or by phone, here's how it works:

Discovery Call: We start with a 10- to 15-minute Discovery Call, where we'll get a basic understanding of your initial needs and concerns and identify which of our services might be a good fit. You should be prepared to talk about your level of income and assets so we can better understand how to help you.

Exploration Meeting: A discussion about your goals, values, hopes and dreams. Ask your questions and share your concerns. We'll provide an overview of our Wealth Management Scorecard system and services . The purpose of the meeting is to understand one another better so we can mutually decide if we'd be a good fit.

In advance of the meeting, we'll send you a list of documents that would be helpful, but not essential, to bring with you. If we end up working together, this will allow us to hit the ground running.

Contract Review, Information Request: We'll send you a Client Service Agreement, which includes our fee proposal, our Disclosure Brochure (Form ADV Part 2), and a brief "Fiscal Philosophy" survey. We'll also provide you with access to our secure online questionnaire.

Kickoff Meeting: We mutually commit to working together and sign all the paperwork needed to get started. We receive your initial payment, completed Fiscal Philosophy survey, requested documents and completed online questionnaire.

Developing a Work Plan: We review all the information you've provided and begin to develop planning priorities, observations and additional questions. We'll contact you as needed to clarify information or request more documents.

1st Planning Meeting: This is where we start addressing your most pressing issues. We generally start with two of the five areas of our Wealth Management Scorecard system.

2nd Planning Meeting: We'll address two or three more areas of our Wealth Management Scorecard system, depending on your situation.

3rd Planning Meeting (if needed): If warranted by your situation, we'll hold a third planning meeting to continue tackling issues. We generally plan to complete the third meeting by the sixth month after the Kickoff Meeting.

Review Meetings: After the initial planning meetings, we'll hold regular review meetings to make progress on implementing solutions, stay current on your situation and update your planning accordingly.

Contact us today to set up a **brief Discovery Call** and take the next step toward gaining greater confidence, security and peace of mind when it comes to money.