Getting started with OnTrack 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.

Contract and Disclosure Review: We'll send you a Client Service Agreement, which includes our fees, our Disclosure Brochure (Form ADV Part 2), and a brief "Fiscal Philosophy" survey. We'll e-mail these documents unless you prefer that we mail them.

Get Acquainted Meeting (optional): If you'd like to get to know us better before committing to work together or selecting services, we can have an 30-minute Get Acquainted Meeting at no charge.

Determine Initial Services: Let us know which services you've selected. We'd be happy to answer any questions by phone or e-mail to help you choose.

Document Request: We'll send you a list of documents to send us and questionnaire once we know which services you've selected.

Document Receipt: To get started, we'll need your signed Client Service Agreement, completed Fiscal Philosophy survey, initial payment and any documents we requested. At this point we'll schedule and start preparing for the Initial Work Meeting.

Initial Work Meeting: This is where we start providing answers to your questions and advice based on your values, needs, and goals. We'll schedule additional Review Meetings based on the services you select.

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