TWG Planning Process

THE WESTERMAN GROUP, LLC
INVESTMENT & WEALTH MANAGEMENT

45 Days

Introduction Interview
(40 Minutes)

- TWG Intro of Services
- Discuss your current situation/vision
- Quantify value of relationship with TWG
- Schedule discovery data interview

Discovery/Data Interview
(2-4 Hours)

- Crystallize objectives/ vision
- Gather data and clarify
- Discuss your vision in order to allow you to accomplish your ideal lifestyle
- Establish and prioritize goals and visions

Try-On Interview
(2 Hours)

- Presentation of your current situation
- Build upon planning strategies that allow you to accomplish your vision of ideal lifestyle
- Educate and discuss planning concepts to achieve ideal lifestyle
- Answer questions
- Clarify data, concepts and strategies; "Did we hear it right?"

Present Plan
(2 Hours)

- Discuss plan
- Educate
- Discussion around planning strategies
- Implementation

Reviews and Updates
(As needed)

- Establish review schedule
- Discuss changes in lifestyle and adapt planning accordingly
- Monitor

CLIENT ASSEMBLES ITEMS NEEDED

TWG BEGINS DESIGN OF PLAN

ADDITIONAL IMPLEMENTATION MEETINGS AS NEEDED