Clear Path
Private Wealth

Referring to Clear Path Private Wealth:
The Client Experience

Initial Meeting (60-90 mins):

- Initial meeting to learn about the clients' goals, dreams, and biggest challenges
- Overview of comprehensive financial planning services Clear Path Private Wealth provides
- Initial discussion of fees, review client questions and discuss early framework of the plan
- Client agrees to move forward / Agreements sent following meeting

Onboarding (60-90 mins):

- Advisor meets with client to collect all documents and data (checklist sent ahead of time)
- Tour of Clear Path Private Wealth website and client portal
- Introduction of Clear Path team

Comprehensive Financial Planning (60-90 mins each):

A series of 2-4 meetings spread out over several weeks including as needed:

- **Comprehensive Wealth Management** – Risk assessment and custom portfolio construction.
- **Financial Planning** – Plan design for confirmation of goals and measures to achieve those goals
- **Business Owner Services** – Exit and Succession Planning / M&A consulting
- **Strategic Tax Planning** – Proactive tax-reduction strategies / Year-round Tax Planning
- **Retirement Planning Services** – Social Security and Medicare strategies tailored to each client
- **Estate Planning and Trusts** – Asset protection to avoid probate
- **Executive Compensation** – Review of Stock Options and Equity Compensation Strategies

Ongoing Reviews (30-60 mins each):

- Following plan implementation, we will set review meetings a few times a year for updates and plan adjustments
- On retainer for all financial needs

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