

Our Process

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DISCOVERY CALL

1 hour call - no charge

Complimentary call to understand your needs in order to provide planning engagement proposal



SIGN CLIENT SERVICE AGREEMENT

Agree to scope of service, payment terms and how we will work together



IMPLEMENTATION

Client implements plan – SFP available to assist for additional fee















INQUIRY CALL

15-30 minute call - no charge

Complimentary call to determine if Sanctuary might be a fit for you



Outline scope of engagement and proposed maximum fee

CONSTRUCT A FINANCIAL PLAN



UPDATE

Life events
(expected and
unexpected) mean
your plan is always
changing –
periodic reviews
and updates keep
you prepared

OPEN ENGAGEMENT

Already have a plan? Looking for a second opinion? SFP is available to consult on an hourly basis if your circumstances are outside the scope of our standard process.

FOUNDATIONAL PLAN

A comprehensive planning solution that removes the guesswork to keep things simple for you.

CUSTOM PLANNING SERVICES

Customize your plan with exactly the elements you need, when you need them.

PLANNING PACKAGES

Unique planning programs for different stages of life.



 $\hfill \square$ 2023 Sanctuary Financial Planning