Our Process

MIYEWIRE
SIMPLIFY YOUR FINANCIAL LIFE

01 INITIAL MEETING

The Initial Meeting provides an opportunity for us to get to know each other a bit and determine whether we are a good fit.

We want to know what has brought you to our office and what you are looking for in an advisory relationship.

We will also provide you with an overview of our investment philosophy, our advising process, and a full description of our fee schedule for services.

02 DATA GATHERING

If we decide to move forward following the Initial Meeting, we will send along a list of information for you to gather and submit for analysis.

This data (i.e. mortgage statements, 401k snapshots, tax returns, etc.) will help us gain an overall understanding of your full financial picture.

03 INTAKE MEETING

At your Intake Meeting, we will verify the information you have provided us.

We will also identify your personal and financial goals and priorities.

This helps us understand what is important to you and what you are hoping to achieve financially.

04 ANALYSIS

Once we have a detailed understanding of your financial picture and your own personal goals and priorities, we will use our cutting edge financial planning software to analyze your data, keeping in mind what is most important to you.

We will run several projections using different scenarios to determine a plan of action that will allow you to achieve your goals. Our team will also identify cash flow inefficiencies, develop effective tax management strategies, and look for ways to maximize and diversify your investment portfolio.

05 DELIVERY MEETING

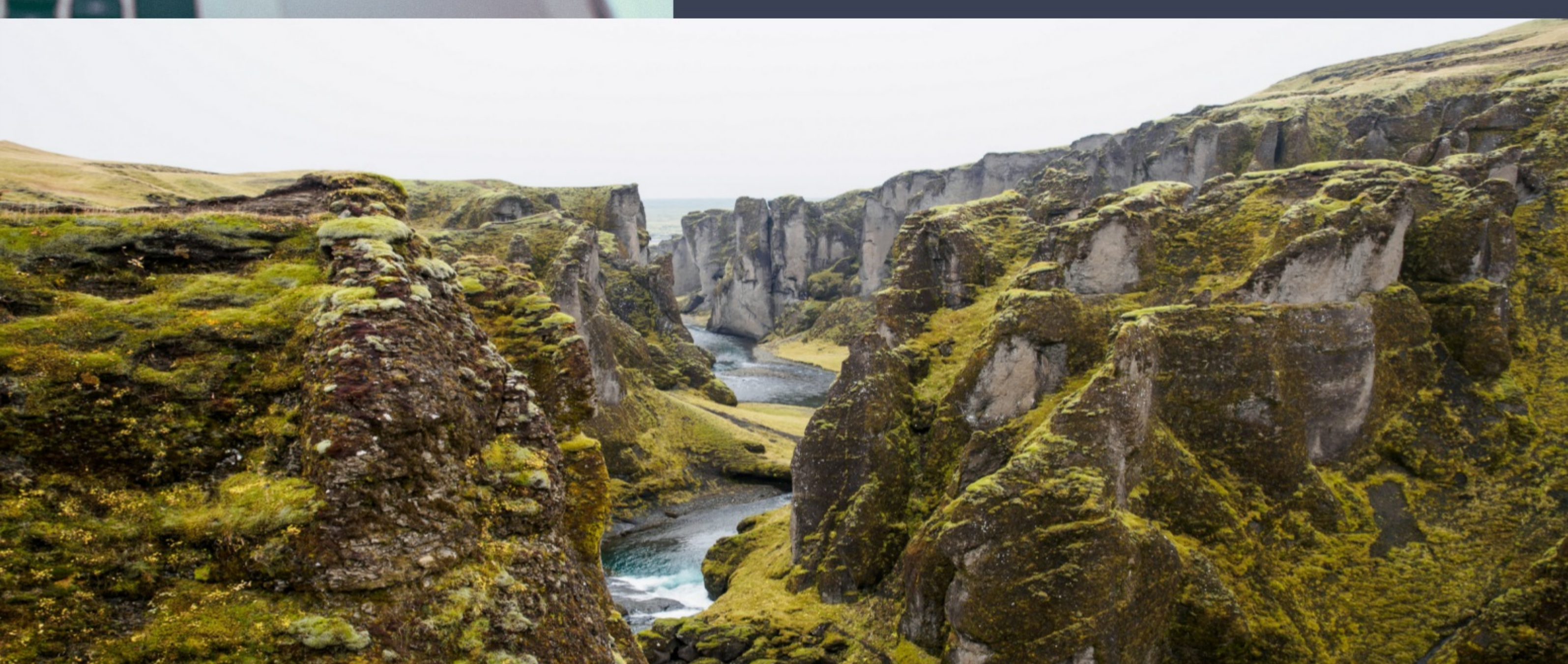
At the Delivery Meeting, we will present our research to you in clear, easy to understand terms, using our interactive software. You will have the opportunity to review different scenarios and change assumptions in order to obtain a full understanding of your current and projected financial health.

We will also provide you with specific, actionable recommendations to help you achieve the financial and personal goals you identified in your Intake Meeting.

06 REGROUP MEETING

Your Regroup Meeting will ideally be scheduled for a week or two after your Delivery Meeting in order to give you time to absorb all of the information presented.

At the Regroup Meeting, we will review your financial plan, answer any additional questions you may have, and develop a plan of action going forward to ensure you achieve your financial goals.



07 FOLLOW UP MEETING

At your first Follow Up Meeting, we will help you complete any necessary account paperwork and take care of any loose ends.

Going forward, Follow Up Meetings will be scheduled as necessary in order to help you make progress toward your goals, monitor your plan, and update the plan as necessary to navigate life's changes.

MiyeWire, LLC

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