Vantage Point Advisors
Service Timeline

Step 1: Discovery Process

- Listen to what is important to you, your family and legacy
- Learn the values that shape your decisions and priorities
- Identify unique challenges and circumstances
- Introduce our philosophy and process

Step 3: Onboarding Process

- Review investment strategy
- Discuss account structure and fees
- Open accounts
- Transfer existing assets

Step 5: Communication Process

- Introduce team
- Review website
- Establish Investor Access
- Customize account correspondence
- Discuss type and frequency of communication

Step 2: Research Process

- Gather data, documents and statements for analysis
- Analyze current investments
- Determine risk parameters

Step 4: Implementation Process

- Analyze assets received
- Confirm current investment strategy
- Execute strategy

Step 6: Review Process

- First strategy update
- Monitor process toward goals
- CPA/Attorney/Estate plan discussion