# Vantage Point Advisors
# Our Client Process

### Step 1: Discovery

- **Listen** to what's important to you and your family
- **Learn** your values and priorities
- **Introduce** our philosophy, our process, and our team
- **Discuss** account structure, GPM and fees

### Step 3: Onboarding

- **Review** investment strategy
- **Open** accounts
- **Transfer** existing assets

### Step 5: Communication

- **Review** VPA website
- **Establish** Investor Access
- **Customize** account correspondence
- **Discuss** type and frequency of communication


### Step 2: Research

- **Gather** data, documents and statements for analysis
- **Analyze** current investments
- **Identify** unique challenges
- **Determine** risk parameters

### Step 4: Implementation

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

### Step 6: Review

- **Strategy** update
- **Monitor** process toward goals
- **Discuss** CPA/Attorney/Estate plan

Vantage Point Advisors OF RAYMOND JAMES®