GOALS
DREAMS
FREEDOM
GUIDEPOST
FINANCIAL PLANNING
Partners On Your Path

Arlen T. Olberding
CERTIFIED FINANCIAL PLANNER™

Creating Your Financial Pathway

Advisor Actions / Responsibilities	Financial Planning Sequence	Client Actions / Responsibilities
When you contact us, we'll provide a brief description of our services, philosophies, and methodology and fee structures. We'll direct you to our web site or mail you an introductory packet to help you learn more.	**Step 1: Guidepost Financial Planning Initial Inquiry**	If our services fit your needs we'll schedule a "Get Acquainted Meeting" (can be done on the phone or in person). You review our introductory materials, or visit our web site to learn more, and then contact us for Step 2.
The Get Acquainted Meeting or Teleconference is an opportunity for us to exchange information about your needs and objectives, and further discuss which of our services are right for you. We will also provide an estimated fee quote.	**Step 2: Get Acquainted Meeting and Goal Setting**	When you decide to engage our services, we will give you a list of additional data or information, which we will need to begin formulating your plan. One-half of the estimated total fee is due at the time of this engagement.
When we receive your information, we begin to review and develop your financial plan. We prepare initial reports to discuss at our Step 4 meeting.	**Step 3: Data Gathering and Initial Preparation**	In Step 3, you gather the data requested, and complete your cash flow worksheet and risk tolerance questionnaire. You may fax e-mail or mail this information to us before our next meeting. Once received, we'll schedule a Step 4 meeting.
In this interactive meeting we discuss and clarify the information you have provided thus far. We continue to refine your financial goals and objectives. We can do this in person or via teleconference.	**Step 4: Refinement of Goals and Clarification of Information**	In this optional Goal Setting Meeting, you have another opportunity to clarify your current situation, financial goals and objectives. Come with any additional questions or concerns you may have.
We review the new information, as needed, and if applicable, run additional scenarios. We then conclude our research and analysis, produce final reports and add our observations and recommendations to your personal financial plan	**Step 5: Analysis and Plan Formulation**	As we move into Step 5, you simply schedule a meeting or teleconference 2 to 3 weeks after our Step 4 meeting. The ball is in our court in the interim. Revisit our web site to stay current on the changing world of personal finance and investments.
In Step 6, we present and review your personal financial plan. We discuss all reports and provide you with a written summary of our observations and specific recommendations.	**Step 6: Presentation of Your Financial Plan**	Congratulations! At this point you will hold a personalized blueprint, custom designed to meet your financial goals. Full payment of the balance for actual fees incurred is due at the conclusion of our plan presentation meeting.
Plan implementation and follow up depends upon which service option is appropriate for your needs. At the conclusion of your plan presentation, we discuss pros and cons including fee structures.	**Step 7: Plan Implementation And Follow Up**	Above all, proper implementation is crucial to reaching your financial goals. Whether you now implement and monitor the plan yourself, or retain us to provide a portion or all of these services for you, we urge prompt action.

c 2007 Guidepost Financial Plannning • 19 Old Town Square, Suite #238 • Fort Collins, CO 80524
(970) 419-8212 • Arlen@GuidepostFinancialPlanning.com • www.GuidepostFinancialPlanning.com