everleap
FINANCIAL PLANNING®

OUR PROCESS

INITIAL PLANNING: FIRST 3-6 MONTHS

Listen + Learn
(FREE CONSULTATION | 45 MINUTES)

- Understand what's bringing you here and the decisions ahead
- Talk about what money means to you and how it supports your life
- Determine mutual fit

Exploration + Envision + Enable
(MEETING #1-3 | 60-90 MINUTES)

- *Explore* the life you most want to live
- *Envision* a clear picture of your most fulfilled life
- Discover potential roadblocks and *enable* you to address those challenges.

Assemble Your Financials
(MEETING #4 | 60-90 MINUTES)

- Build a clear picture of your current financial situation
- Identify missing information
- Draft your cash flow and financial planning profile
- Incorporate your life goals into the financial plan

Plan + Prioritize
(MEETING #5-6 | 60-90 MINUTES)

- Bring your vision and finances together into a cohesive strategy
- Review key recommendations and prioritize next steps
- Create a clear, written plan to guide your actions

Make Every Leap Count

ONGOING PLANNING

YEAR 1 AFTER INITIAL PLAN

Implementation Support
(CHECK-IN MEETINGS | 30-60 MINUTES)

- Guide you through implementing your plan
- Collaborate with your CPA, attorney, and other service professionals
- Track progress and keep momentum on your action items

YEAR 2 & BEYOND

JAN - APR
Year-Ahead Review

- Goals and year-ahead planning
- Net worth update
- Income and paystub review
- Cash flow and savings review
- Tax return readiness
- Investment allocation review and rebalancing
- Other areas as needed

MAY - AUG
Mid-Year Check-In

- Tax return review
- Stock compensation review
- Investment plan check-in
- Retirement projection update
- Saving for kids and education planning
- Property/liability insurance review (every other year)
- Other areas as needed

SEP - DEC
Year-End Review

- Benefits enrollment and life/disability insurance review
- Year-end tax planning
- Year-end investment deadlines (loss/gain harvesting, Backdoor Roth, etc.)
- Beneficiary & estate plan review (every other year)
- Other areas as needed

RECURRING YEAR-AROUND

Stock compensation analysis and rebalancing aligned with your vesting schedule and trading window

Tax planning quarterly review that proactively identifies strategies to reduce your lifetime taxes

Monthly or quarterly meetings to work on action items and discuss progress

On-demand email or meeting support for time-sensitive questions and decisions