MOSAIC PLANNING PROCESS

START
Unknowns
Concerns
Frustrations

1 Discovery Meeting

2 Financial Data Gathering

3 Analysis of Current Situation

6 Establish Relationship

5 Identify Roadmap to Success

4 Presentation of Finding

7 Complete Account Transition Paperwork

8 Transfer of Assets

9 Education & Review of Plan

FINISH
Educated
Understanding
Confident

12 Ongoing Monitoring of Plan

11 Delivery of Plan

10 Implementation of Plan