NEW CLIENT JOURNEY

Gaia wealth management

STEP 1 – FINANCIAL FITNESS

Time: 15-30 minutes

You share: Your current financial situation, why you're seeking an advisor.

I share: Our philosophy and way of working together.

Goal: Determine if we're the right financial and personality fit.

STEP 2 – DISCOVERY

Time: 90 Minutes

You share: Current financials, relationship with money, questions, goals and risk tolerance.

I share: Process and approach.

Goal: Get to know each other better.

STEP 3 – PROPOSAL & DECISION

Time: 90 Minutes

You share: Financial goals

I share: Assessment and insights relevant to your situation, strategies and priorities, proposal and cost for working together.

Goal: Decide if we trust each other and want to move forward.

STEP 4 – ONBOARD

Time: 2-5 Meetings

You share: Time, attention, feedback, priorities, paperwork and account transfer details

I share: This is where I go deep – all my time, expertise and hand-holding.

Goal: Handle the details and get our little yellow ducks in a row.

STEP 5 – MONITOR

Time: 30-60 Minutes

You share: The bigger vision, plan forward and communication preferences.

I share: Encouragement, continuous monitoring of progress.

Goal: Set expectations and goals for the relationship.

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