

## VIDEO TITLE: Onboarding



Estimated Total Runtime: 2:05

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[Eric]

Do you ever wonder what to expect when you first meet with a financial advisor?

What exactly is the process they take you through? I believe it's important to have a well thought out process that potential new clients understand and aligns with what they are trying to accomplish.

I believe the first meeting with an advisor should center around what I refer to as a "Discovery Meeting" or "Fit Meeting". This is where I strive to get to the truth of what your issues truly are...

I see myself in this role acting much like a doctor, trying to understand your main concerns, listen to what you say (and don't say), and by undertaking a thorough diagnosis to get to the real issues, and focusing on being a real problem solver.

Think of me as your financial doctor, guiding you every step of the way to better understand your vision, goals, and aspirations. I would also like to understand your financial history as well as your current and long-term concerns. And I promise, no shots or blood draws in my office!

As we get started on this journey together... we'll carefully analyze your financial health, using our Envision® analysis or our LifeSync® process. This helps us better understand what truly matters to you and those you care most about.

Once we agree on your plan, we'll put it into motion –I'll put together customized recommendations, strategies and possible solutions for you to review.

If you agree to move forward on my recommendations then we'll implement your plan, open new accounts and discuss working with your CPA and other professionals, to build a team dedicated to your financial well-being.

Then **you'll** set the pace, deciding how often you'd like to review your plan.

Our partnership is ongoing, and we'll update and make changes to the plan as your goals change, the markets change, and we come across other life transitions.

Let's get started today! Remember, At APEX Securities and Asset Management, we care about you and your financial future.

**Apex Securities & Asset Management, LLC**

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