



ELEVATION
FINANCIAL

SIMPLE CLIENT ONBOARDING & ONGOING SERVICE

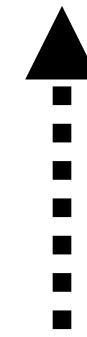
PRESENTED BY: MICHAEL REYNOLDS



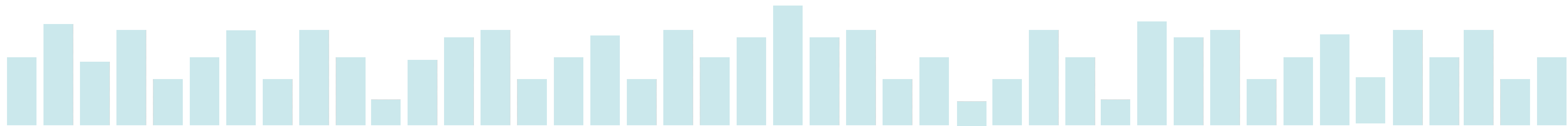
MICHAEL REYNOLDS

- Principal of Elevation Financial
- Cellist
- Sushi connoisseur
- Tennis/pickleball player
- Marketing/tech nerd
- Star Trek > Star Wars
- www.elevationfinancial.com

elevationfinancial.com/simple

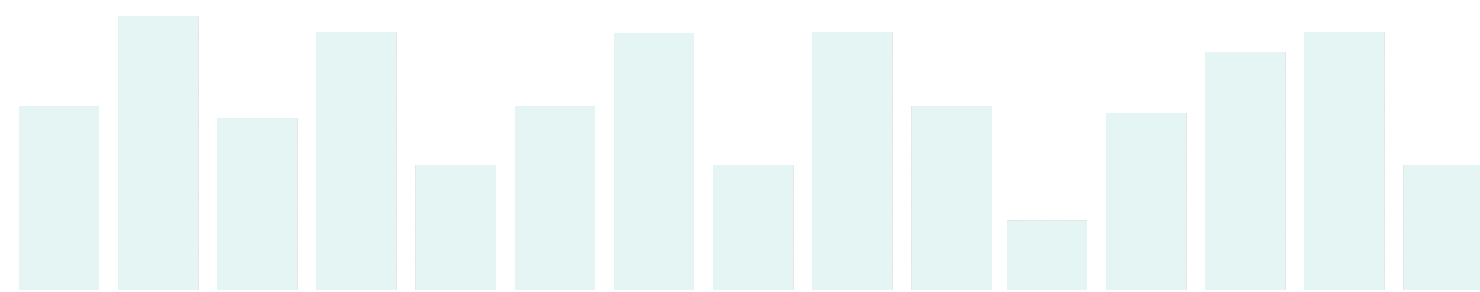


(templates & resources)



My Practice

- Owned a digital marketing agency for 23 years, sold it in December 2018
- Opened March 1, 2019
- 77 clients
- \$5.5M in AUM
- 100% virtual (no office)
- Clientele is “**Socially Conscious Financial Planning & ESG Investing**”
- Also lots of solo/small business owners
- No minimums / accessible to all





My Goals

- Run a business that is scalable and efficient
- Provide great service
- Minimize wasted tech (and wasted money)
- Minimize “mental overhead”
- Nothing falls through the cracks
- Reduce time spent reinventing the wheel
- Take on more clients without more overhead

Core Tech Stack

- DocuSign
- AdvicePay
- Wealthbox
- RightCapital
- Altruist
- Portfolio Visualizer
- Calendly
- Google Workspace
- Docket
- Jotform
- Holistiplan



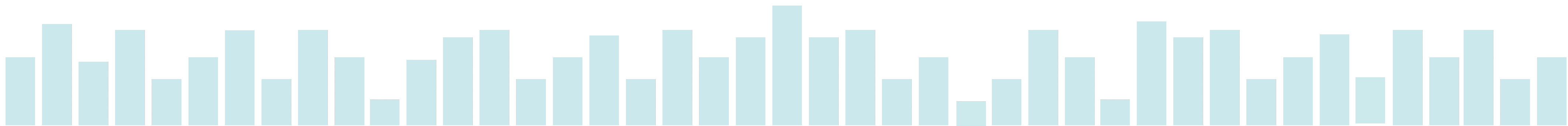
Pricing

One-time Planning Fee + Annual Investment Management Fee (billed quarterly directly from investments)

- ✓ \$150 for clients with an annual household income under \$50,000
- ✓ \$300 for clients with an annual household income from \$50,000 - \$99,999
- ✓ \$450 for clients with an annual household income of \$100,000 and up

Transparent, all-inclusive pricing.

ASSETS UNDER MANAGEMENT	ANNUAL FEE
Up to \$250,000	1.00%
\$250,001 - \$500,000	0.90%
\$500,001 - \$1,000,000	0.80%
\$1,000,001 - \$3,000,000	0.50%
\$3,000,001 & above	0.45%





Our Process

Client Onboarding



Annual Service Calendar (Three Review Meetings in a Year)



INVESTMENT MANAGEMENT

ON-DEMAND ADVICE, CONSULTING, MENTORING

Prospect Becomes a Client

DocuSign eSignature

HomeManageTemplatesReportsSettings

Upgrade?

☆ Elevation Financial - Client Agreement (Joint) ⓘ

Template ID

USEEDITMOVESHAREMORE

Recipients

1 Client:Needs to Sign

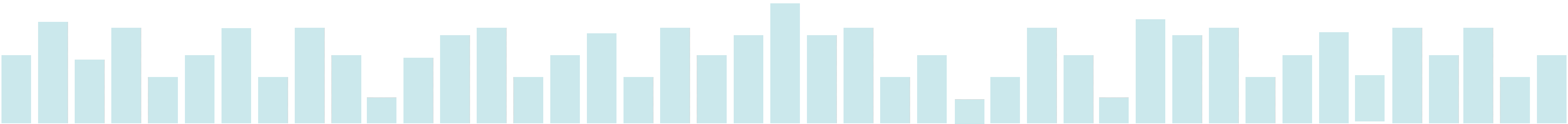
2 Co-client:Needs to Sign

3 Advisor:Needs to Sign

SIGNING ORDER

Elevation Financi...
Pages: 22

1 of 22



Workflow Template Steps	
★ Create client folder and save signed agreement	Due: No due date Assigned to: Contact Owner
★ Link client folder to each contact	Due: 1 day after previous step completed Assigned to: Contact Owner
★ Add to State Registration Tracker Spreadsheet	Due: 1 day after previous step completed Assigned to: Contact Owner
★ Update client status in Wealthbox	Due: No due date Assigned to: Contact Owner
★ Update client address and contact information	Due: No due date Assigned to: Contact Owner
★ Check box for any business owners	Due: 1 day after previous step completed Assigned to: Contact Owner
★ Add to email list	Due: No due date Assigned to: Contact Owner
★ Send scheduling email	Due: No due date Assigned to: Contact Owner
★ Confirm that first meeting is scheduled	Due: 2 days after previous step completed Assigned to: Contact Owner
★ Send invoice for payment	Due: 1 day after previous step completed Assigned to: Contact Owner
★ Send RightCapital onboarding email	Due: No due date Assigned to: Contact Owner
★ Invite to RightCapital	Due: No due date Assigned to: Contact Owner
★ Create thank you gift todo if client was a referral	Due: No due date Assigned to: Contact Owner
★ MEETING #1: "Get Organized" Meeting	Due: No due date Assigned to: Contact Owner

Start Onboarding

- Start workflow for onboarding in WB
- Enough detail so I don't have to think
- Specific and actionable

Name:

Theme:

Cc:

Bcc:

Subject:

Template Content:

B *I* U

Insert Mail Merge

Hi, {{Contact.Nickname || Contact.FirstName}}!

Thanks for sending back the agreement. I'm excited to be working with you! Let's get our first meeting scheduled. You can do that here:

<https://calendly.com/elevationfinancial/getorganized>


Once that is scheduled I will follow up with more information and next steps.



Any questions, let me know. Looking forward to talking soon!

Thank you,

Scheduling Email

- Preset template in WB
- Click on email address to open and send
- No typing or thinking


ELEVATION
FINANCIAL


Michael Reynolds
Planning Session #1: "Get Organized" Meeting
 1 hr
During this meeting, we will review the financial information entered into RightCapital and fill in any missing data as well as clarify and update information.


Select a Date & Time


November 2021

<

>

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

 Eastern Time - US & Canada (10:50am) ▾

 Troubleshoot

Calendly Event

- Dedicated event for this meeting
- Includes description for clarity

Name:

New Client RightCapital Onboarding Email

Theme:

Select..

Cc:

Search contacts or users...

Bcc:

Search contacts or users...

Subject:

Financial Data

Template Content:

B I U [List Icon] [Align Icon] [Link Icon] [Image Icon] [Table Icon] [Code Icon] Insert Mail Merge

Hi, {{Contact.Nickname || Contact.FirstName}}!

Thanks for scheduling our "Get Organized" meeting. To prep for our meeting, I will be setting up your financial dashboard so we can use it as a framework for planning.

I will send you an invitation to a tool called RightCapital. It's a web-based portal and once you set up an account and log in, it will ask you to enter in some financial information. If you could, enter in and/or link up (to the best of your ability/knowledge) if applicable:

- Kids living at home
- Bank accounts
- Credit cards
- Stock
- Life insurance
- Disability insurance
- Long-term care insurance
- Retirement/investment accounts
- Loans (mortgage, car loans, student loans, etc.)
- Property (primary home, vacation/rental homes, etc.)
- Businesses
- Income
- Savings rates
- Expenses
- Investment account statements (upload to Vault)
- Latest tax return (upload to Vault)

You will not see the Vault until you go through the whole process and click "Complete" at the end. Once you do that, you will see three dots in the upper right. Click that to find the Vault. This is where you will upload your recent investment account statements and most recent tax return.

You may run into some issues where your bank or investment account provider is not listed. If so, just enter in the account info manually. Enter in only personal accounts, not business accounts.

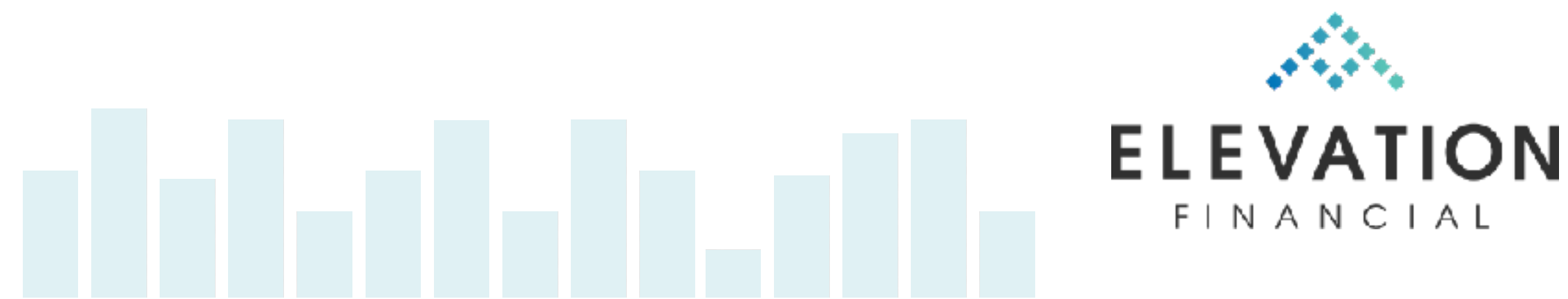
Don't worry about getting everything in perfectly. Just do the best you can. We'll fill in gaps when we meet.

Any questions, let me know. Looking forward to talking soon!

Thank you,

RightCapital Onboarding

- Bulleted item will look like this
- Here is another
- Wow bullet points are awesome
- Nice Bullets make a slide look nice
- We love bullets
- Bullets are nice to see



Manage Templates

Q @

@ Beginning of Year Review

No meeting purpose specified.

@ Budget Session

No meeting purpose specified.

@ Business Thinking Session

No meeting purpose specified.

@ End of Year Review

No meeting purpose specified.

@ General Meeting

No meeting purpose specified.

@ Introductory Meeting / Money S...

No meeting purpose specified.

@ Meeting #1: "Get Organized" M...

No meeting purpose specified.

@ Meeting #2: Goal Setting

No meeting purpose specified.

@ Meeting #3: Plan Review

No meeting purpose specified.

@ Mid-Year Review

No meeting purpose specified.

+ New Template

@ Meeting #1: "Get Organized" Meeting

Created Tuesday, July 14 at 10:51am

Meeting Purpose: What do you plan on accomplishing in this meeting?

General "what's on your mind right now" discussion

Start with any questions or pressing issues on your mind right now.

Walk through RightCapital and fill in gaps

We will go through RightCapital together and fill in missing data, as well as create task items for followup.

Family

Is there a will

Bank accounts

Credit cards

Stock

Life insurance

Disability insurance

LTC

Health insurance (is premium over 10% of gross income?)

Retirement/investment accounts

Loans

Property

Businesses

Income

Savings rates


Expenses


Investment account statements

Latest tax return

Docket for Meetings

- Preset agenda stored as template
- No typing or creating agendas





Sample Meeting

Friday, October 22 from 2:00pm - 2:15pm



Templates ▾ | Collaborate # | Meeting Info ⓘ | Private Notes 🔒

Send Agenda ▾

Send Recap ▾

Me **Meeting Purpose:** What do you plan on accomplishing in this meeting?

General "what's on your mind right now" discussion



Start with any questions or pressing issues on your mind right now.

Take some notes...

Walk through RightCapital and fill in gaps



We will go through RightCapital together and fill in missing data, as well as create task items for followup.

- Family
- Is there a will
- Bank accounts
- Credit cards
- Stock
- Life insurance
- Disability insurance
- LTC
- Health insurance (is premium over 10% of gross income?)
- Retirement/investment accounts
- Loans
- Property
- Businesses
- Income
- Savings rates
- Expenses
- Investment account statements
- Latest tax return

“Get Organized” Meeting

- Go through RightCapital together
- Fill in missing info
- Update date
- Ask questions
- Assign Tasks

★	MEETING #1: "Get Organized" Meeting
Due:	No due date
Assigned to:	Contact Owner
★	Schedule Meeting #2: Goal Setting
Due:	No due date
Assigned to:	Contact Owner
★	Update contact record(s) with date of birth
Due:	No due date
Assigned to:	Contact Owner
★	Set up new accounts
Due:	No due date
Assigned to:	Contact Owner
★	Upload tax returns to Holistiplan
Due:	No due date
Assigned to:	Contact Owner
★	MEETING #2: Goal Setting
Due:	No due date
Assigned to:	Contact Owner
★	Send Investment Questionnaire
Due:	No due date
Assigned to:	Contact Owner
★	Schedule Meeting #3: Plan Review
Due:	No due date
Assigned to:	Contact Owner
★	Apply fee billing schedule to household
Due:	No due date
Assigned to:	Contact Owner
★	Create financial plan
Due:	3 days after previous step completed
Assigned to:	Contact Owner
★	Create Investment Policy Statement
Due:	Same day as previous step completed
Assigned to:	Contact Owner
★	MEETING #3: Plan Review & Implementation Phase
Due:	No due date
Assigned to:	Contact Owner
★	Place into Annual Client Service Calendar Workflow (pro-rate current year using tasks if necessary)
Due:	1 day after previous step completed
Assigned to:	Contact Owner

Workflow Continues

- Fill in more data
- Set up accounts
- Upload tax return

ONE PAGE FINANCIAL PLAN

Name(s)

Last updated: 00/00/2021

Reason for Building Wealth

Strengths

Challenges

Opportunities

Threats

Goals

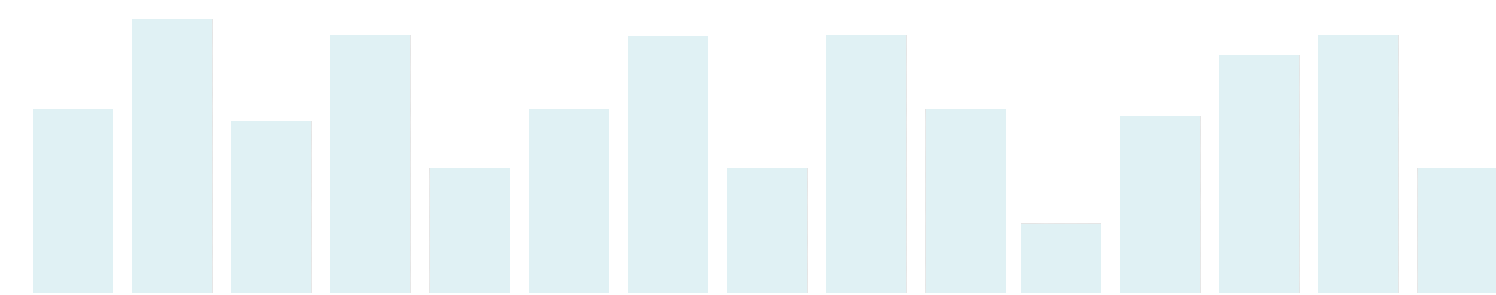
Objectives

Please let me know if anything has changed and/or if you would like to schedule a meeting. You can use my calendar link to book an appointment any time: <http://elevationfinancial.com/meet>



Goal Setting Meeting

- Open up “One-Page Financial Plan”
- Work through questions together
- Complete all sections except Objectives



Name:

Theme:

Cc:

Bcc:

Subject:

Template Content

B I U [List Icons] [Quote Icon] [Image Icon] [Link Icon] [Download Icon] [Code Icon] Insert Mail Merge

Hi, {{Contact.Nickname || Contact.FirstName}}!

Great seeing you. Before our next meeting, could you fill out the following investment questionnaire:

<https://www.elevationfinancial.com/iq>

It will help inform our conversation about your investments.

I look forward to seeing you soon!

Thank you,

Include the recipient's name in the message using mail merge tags to make it more personal. For example, `{{Contact.FirstName}} {{Contact.LastName}}` will show "Kevin Anderson" in the email. You can also use `{{Signature}}` to display your saved signature.

Investment Questionnaire

- Simple email with link to online questionnaire
- Location: [elevationfinancial.com/iq](https://www.elevationfinancial.com/iq)
- Build in-house using JotForm

★	MEETING #1: "Get Organized" Meeting		
Due:	No due date	Assigned to:	Contact Owner
★	Schedule Meeting #2: Goal Setting		
Due:	No due date	Assigned to:	Contact Owner
★	Update contact record(s) with date of birth		
Due:	No due date	Assigned to:	Contact Owner
★	Set up new accounts		
Due:	No due date	Assigned to:	Contact Owner
★	Upload tax returns to Holistiplan		
Due:	No due date	Assigned to:	Contact Owner
★	MEETING #2: Goal Setting		
Due:	No due date	Assigned to:	Contact Owner
★	Send Investment Questionnaire		
Due:	No due date	Assigned to:	Contact Owner
★	Schedule Meeting #3: Plan Review		
Due:	No due date	Assigned to:	Contact Owner
★	Apply fee billing schedule to household		
Due:	No due date	Assigned to:	Contact Owner
★	Create financial plan		
Due:	3 days after previous step completed	Assigned to:	Contact Owner
★	Create Investment Policy Statement		
Due:	Same day as previous step completed	Assigned to:	Contact Owner
★	MEETING #3: Plan Review & Implementation Phase		
Due:	No due date	Assigned to:	Contact Owner
★	Place into Annual Client Service Calendar Workflow (pro-rate current year using tasks if necessary)		
Due:	1 day after previous step completed	Assigned to:	Contact Owner

Workflow Continues

- Fill in more data
- Set up accounts
- Upload tax return

Investment Policy Statement - [TEMPLATE]

File Edit View Insert Format Data Tools Add-ons Help

Last edit was seconds ago

100%

\$ % .0 .00 123


Lato

10

B I U A

B9

1/19/1977

	A	B	C	D	E	F
1	<div>  <div> <div>ELEVATION</div> <div>FINANCIAL</div> </div> </div>					
2	Investment Policy Statement					
3	Michael & Ariana Reynolds					
4	Last updated: 10/19/2021					
5						
6	Investment Profile					
7	Client	Date of Birth	Age	Risk Tolerance	Risk Preference	ESG Preference
8	Michael Reynolds	7/3/1976	45	Aggressive Growth	Aggressive Growth	Must Have
9	Ariana Reynolds	1/19/1977	44	Aggressive Growth	Growth	Somewhat Important
10						
11	Investment Accounts					
12	Account Name	Account Label	Account Number	Tax Status	Strategy	
13	Michael Reynolds Roth IRA		****6310	Tax Free	Aggressive Growth	
14	Ariana Reynolds Roth IRA		****6727	Tax Free	Aggressive Growth	
15	Michael & Ariana Reynolds JTWROS	Long-term Investing	****5754	Taxable	Aggressive Growth	
16	Michael & Ariana Reynolds JTWROS	Short-term Investing	****5239	Taxable	Moderate Growth	
17						
18	Notes & Special Instructions					
19	TBD...					
20						
21	Investor Understanding & Acceptance					
22	Receipt of this Investment Policy Statement certifies the following:					
23	I have discussed my current financial situation, including my assets, debts, income sources and expenses, and my financial objectives with my advisor. I understand the risks inherent in investing. Investments are not guaranteed and may lose value. I agree to inform Elevation Financial LLC whenever my circumstances or preferences regarding these accounts change in order to determine if a revised Investment Policy Statement should be prepared.					
24						
25	Portfolio Categories					
26	Aggressive Growth	This portfolio is appropriate for investors whose primary objective is maximum long-term capital appreciation and who are willing to tolerate more substantial, potentially large price fluctuations. Generating current income is not a goal. Assets in this portfolio are invested entirely (or almost entirely) in equities (stocks) and may contain alternatives, depending on client preferences and financial situation.				
27	Growth	This portfolio is appropriate for investors whose primary objective is long-term capital appreciation and who are willing to tolerate potentially large price fluctuations. Generating current income is not a primary goal. Assets in this portfolio are invested primarily (and in some cases entirely) in equities (stocks).				
28	Moderate Growth	This portfolio is appropriate for investors whose primary objective is capital appreciation and to whom current income is of secondary importance. A moderate growth investor is willing to tolerate short-term price fluctuations. The assets in this portfolio are a mix of equities (stocks) and fixed-income securities (bonds), with a higher weighting towards equities (stocks).				
29	Conservative Growth	This portfolio is appropriate for investors who prefer a balanced mix of current income and capital appreciation, and are willing to tolerate some short-term price fluctuations associated with equity (stock) investments. The assets in this portfolio are balanced among equities (stocks) and fixed-income securities (bonds).				
		This portfolio is appropriate for investors whose primary objective is current income. The majority of assets in this portfolio are				

Create IPS

- Keep it simple
- Google Sheets for maximum scalability

Sample Meeting

Friday, October 22 from 2:00pm - 2:15pm

[Templates](#) ▾ | [Collaborate](#) 𠄎 | [Meeting Info](#) ⓘ | [Private Notes](#) 𠄎

Me **Meeting Purpose:** What do you plan on accomplishing in this meeting?

What's on your mind right now?

Start with a review of what has your attention right now.

Take some notes...

Review open todo items

See what's open on the task list from last time and how to support progress. Also check on account opening status and rollovers/transfers, if applicable.

Take some notes...

Review financial plan

Review financial plan together.

Take some notes...

Review Investment Questionnaire & IPS

Review the results of your investment questionnaire and discuss investment plan.

Take some notes...

Review one-page financial plan

Review the one-page financial plan and discuss Objectives.

Plan Review Meeting

- Review the plan in RightCapital
- Review IPS
- Review One-Page Financial Plan
- Assign implementation items

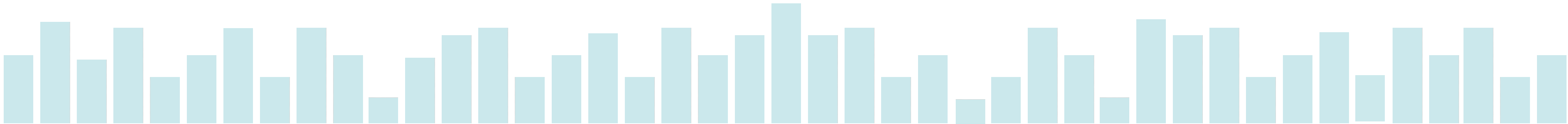
Last Step

×

Step Details

Place into Annual Client Service Calendar Workflow (pro-rate current year using tasks if necessary)

Workflow	Onboarding + Financial Plan Setup
Due	1 day after previous step completed
Priority	★ Medium
Assigned to	Contact Owner



Annual Client Service Calendar

Actions ▾

⌕ Start Workflow

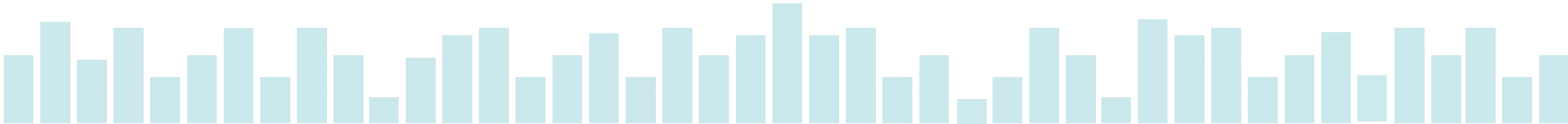
Workflow Template Steps

★ Beginning of Year Review
Due: 3 days after workflow start or previous step completed **Assigned to:** Contact Owner

★ Mid-year Review
Due: 120 days after workflow start **Assigned to:** Contact Owner

★ End of Year Review
Due: 240 days after workflow start **Assigned to:** Contact Owner

★ MAINTENANCE: Start Next Year's Workflow Dated January 1
Due: 15 days after previous step completed **Assigned to:** Contact Owner



Beginning of Year Review

- Template email with scheduling link
- Gives preview of what to expect

Name:

Theme:

Cc:

Bcc:

Subject:

Template Content:

B I U [List Icon] [Text Icon] [Quote Icon] [Image Icon] [Link Icon] [Audio Icon] [Code Icon] Insert Mail Merge

Hi, {{Contact.Nickname || Contact.FirstName}}!

I hope you're doing well in the new year. I'd like to schedule our beginning of year review meeting to cover a few things including:

- Review and update your financial plan
- Review your investments
- Budget and cash flow review (if applicable)
- Tax prep
- Anything else that's on your mind

You can schedule our appointment at:


<https://calendly.com/elevationfinancial/beginningofyear>

Just grab a time that is in the month of January, February, or March so we can chat before tax time.

I look forward to connecting soon!


Thank you,

Include the recipient's name in the message using mail merge tags to make it more personal. For example, `{{Contact.FirstName}} {{Contact.LastName}}` will show "Kevin Anderson" in the email. You can also use `{{Signature}}` to display your saved signature.




ELEVATION

FINANCIAL





Michael Reynolds

Beginning of Year Review


 1 hr 30 min


Beginning of year review

Select a Date & Time

November 2021  

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

 Eastern Time - US & Canada (11:31am) ▼

 Troubleshoot

Specific Calendy Event

- Event is specific to beginning of year review

What event is this?

Beginning of Year Review. Zoom, Phone call

When can people book this event?

90 min, 120 rolling calendar days

Additional Options

Invitee Questions

Name, Email, Location + 1 question

Workflows

Set up automations around your events, such as email and text notifications, thank you emails, etc.

Notifications and Cancellation Policy

Calendar Invitations, No Reminders

Confirmation Page

Redirect after confirmation

Cancel

Save & Close

On confirmation ?

Redirect to an external site

Redirect URL * ?

https://www.elevationfinancial.com/beginningofyearprep

☐ Pass event details to your redirected page. [Learn More](#)

Cancel



Save & Close

Collect Payments

no payment method

Deliver Checklist

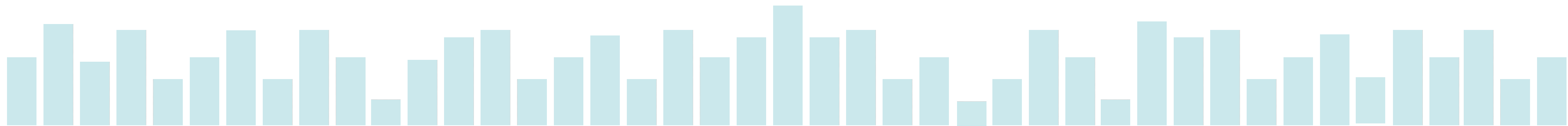
- Confirmation page redirects to checklist
- Host on unique page so that it can be easily changed in one place if needed



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Pre-meeting Checklist - Beginning of Year Review

Thanks for scheduling a Beginning of Year Review! I look forward to seeing you soon. Before we meet, I'd like to ask that you complete a few things to prepare for our meeting. You can download the checklist here.

[Download Checklist](#)

BEGINNING OF YEAR REVIEW

I am looking forward to meeting with you for our upcoming Beginning of Year Review! Here is a checklist of action items that I would like to request that you complete before we meet. If it's not possible or life gets in the way, please don't let it cause you any stress. Do the best you can.

- ☐ Log into RightCapital and update anything that may have changed. Things like **income, debt, expenses**, etc. especially any accounts or debts that have been added manually. Also **fix any banking links** that may need re-authentication and add any new bank accounts that may have been opened. The RightCapital login is: <https://elevationfinancial.com/rightcapital>
- ☐ Review the Objectives in your One-Page Financial Plan for reference during our meeting.
- ☐ Complete a new Investment Questionnaire online here (for couples, each person will complete their own): <https://elevationfinancial.com/iq>

If you have any questions or need any help with anything, please don't hesitate to reach out. I look forward to seeing you soon!

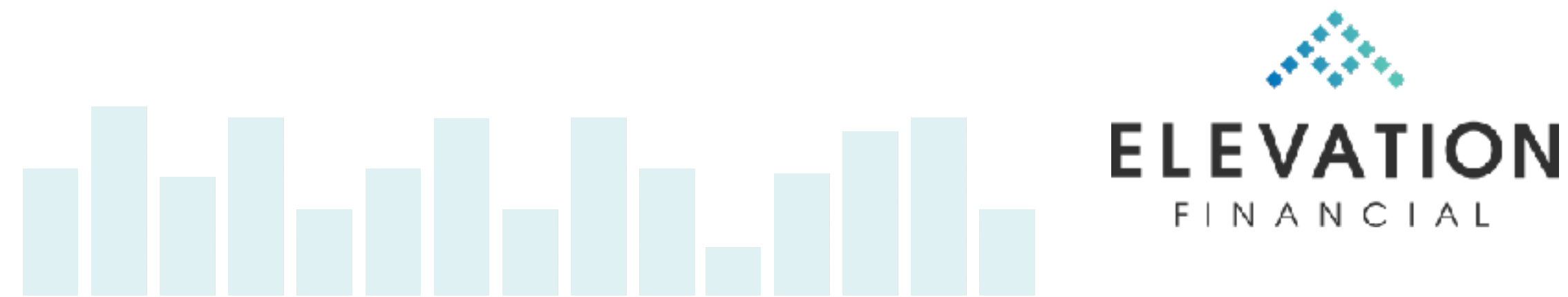
Thank you,
Michael Reynolds

Please let me know if anything has changed and/or if you would like to schedule a meeting. You can use my calendar link to book an appointment any time: <http://elevationfinancial.com/meet>



Pre-meeting Checklist



- Downloadable PDF
- List of items for client to complete before meeting




Calendly Reminders

- Calendly workflows prompt with reminders to complete checklist

What event is this?


Beginning of Year Review,  Zoom,  Phone call



When can people book this event?


90 min, 120 rolling calendar days

Additional Options



Invitee Questions

Name, Email, Location + 1 question








Workflows

Set up automations around your events, such as email and text notifications, thank you emails, etc.


Cancel

Active workflows

If you need to edit or manage workflows for all your event types, visit the [workflows tab](#) 


Name	Applies to	When this happens	Do this	
Pre-meeting Checklist - Beginning of Year Review (Reminder #1)	 Beginning of Year Revi...	7 days before event starts	Send email to invitee	
Pre-meeting Checklist - Beginning of Year Review (Reminder #2)	 Beginning of Year Revi...	1 day before event starts	Send email to invitee	

Cancel




Notifications and Cancellation Policy

Calendar Invitations, No Reminders



Confirmation Page

Calendly confirmation page, no active links




Collect Payments

no payment method

Edit: Email to invitee

What email address should this email be sent from?



 michael@elevationfinancial.com

Manage your Gmail settings in [Integration settings](#)

Choose a template






Custom

Subject

  + Variables

ACTION ITEMS to prep for Upcoming Meeting: **Event Name** with **Event Organizer Name** at **Event Time** on **Event Date**

Body

  **B** *I* U    + Variables

Hi, **Invitee Full Name** !

I'm looking forward to seeing you for our upcoming Beginning of Year Review at **Event Time** on **Event Date** .

To prep for the meeting, I have a short checklist of things for you to review and complete here before we meet:

<https://www.elevationfinancial.com/beginningofyearprep>

Please let me know if you have any questions.

Thank you!

Michael Reynolds

☐ Include reconfirmation button ⓘ

☒ Include cancel and reschedule links ⓘ

☐ Include cancellation policy ⓘ

Cancel Done

Reminder Emails

- Reminder email links to checklist

Sample Meeting

Friday, October 22 from 2:00pm - 2:15pm

[Templates](#) | [Collaborate](#) | [Meeting Info](#) | [Private Notes](#)

[Send Agenda](#) | [Send Recap](#)

Me

Meeting Purpose: What do you plan on accomplishing in this meeting?

General "what's on your mind right now" discussion

Start with any questions or pressing issues on your mind right now.

Take some notes...

Check on open todo items

Add agenda description

Take some notes...

Make sure RightCapital is up to date

- Income
- Expenses
- Debt
- Bank accounts
- Investments

Take some notes...

Investment Review

- Update Investment Policy Statement
- Previous year contributions before tax deadline
- Review ESG impact report (if applicable)

Beginning of Year Review

- Agenda for beginning of year items to cover

Name:

Theme:

Cc:

Bcc:

Subject:

Template Content:

B *I* U Insert Mail Merge

Hi, {{Contact.Nickname || Contact.FirstName}}!

I hope you're doing well. I can't believe it but we're coming up on the halfway mark for the year and I would love to schedule some time to talk money with you in the next 30-60 days. I like to focus on a few things including:

- Review/update your overall financial plan
- Check in on progress toward your objectives in your one-page financial plan
- Anything else that's on your mind

You can schedule our appointment at:

<https://calendly.com/elevationfinancial/midyear>


I look forward to connecting soon!


Thank you,

Include the recipient's name in the message using mail merge tags to make it more personal. For example, `{{Contact.FirstName}} {{Contact.LastName}}` will show "Kevin Anderson" in the email. You can also use `{{Signature}}` to display your saved signature.

Mid-Year Review


- Template email with scheduling link
- Gives preview of what to expect





Michael Reynolds

Mid-year Review


 1 hr 30 min


Mid-year review

Select a Date & Time

November 2021

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				



 Eastern Time - US & Canada (11:33am) ▼

 Troubleshoot

Specific Calendy Event

- Event is specific to mid-year review

What event is this?

Mid-year Review,  Zoom,  Phone call

When can people book this event?

90 min, 120 rolling calendar days

Additional Options

Invitee Questions

Name, Email, Location + 1 question

Workflows

Set up automations around your events, such as email and text notifications, thank you emails, etc.

Notifications and Cancellation Policy


Calendar Invitations, Email Reminders

Confirmation Page


Redirect after confirmation

Cancel

Save & Close

On confirmation 

Redirect to an external site

Redirect URL * 

https://www.elevationfinancial.com/midyearprep

☐

Pass event details to your redirected page. [Learn More](#)

Cancel


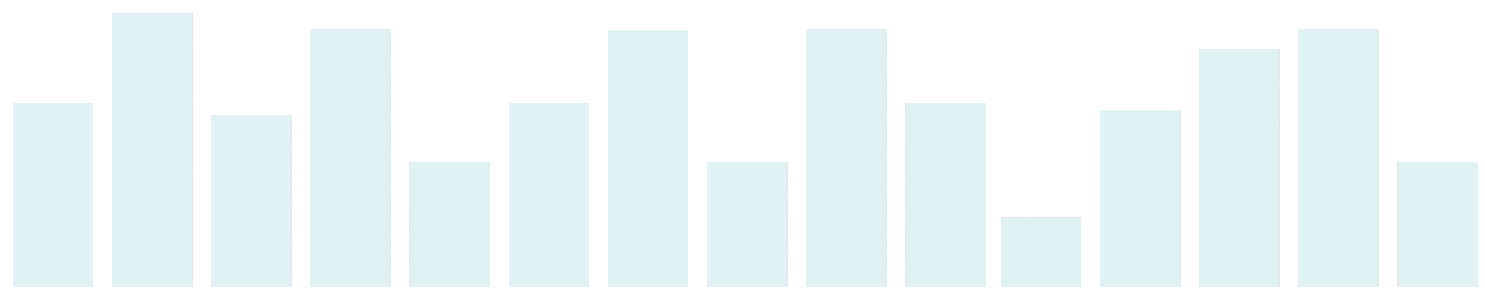
Save & Close

Collect Payments

no payment method

Deliver Checklist

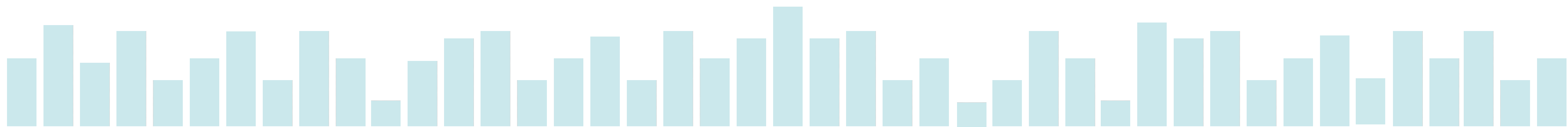
- Confirmation page redirects to checklist
- Host on unique page so that it can be easily changed in one place if needed



ELEVATION
FINANCIAL

Pre-meeting Checklist - Mid-Year Review

Thanks for scheduling a Mid-Year Review! I look forward to seeing you soon. Before we meet, I'd like to ask that you complete a few things to prepare for our meeting. You can download the checklist here.

[Download Checklist](#)

MID-YEAR REVIEW

I am looking forward to meeting with you for our upcoming Mid-Year Review! Here is a checklist of action items that I would like to request that you complete before we meet. If it's not possible or life gets in the way, please don't let it cause you any stress. Do the best you can.

- ☐ Log into RightCapital and update anything that may have changed. Things like **income, debt, expenses**, etc. especially any accounts or debts that have been added manually. Also **fix any banking links** that may need re-authentication and add any new bank accounts that may have been opened. The RightCapital login is: <https://elevationfinancial.com/rightcapital>
- ☐ Review the Objectives in your One-Page Financial Plan for reference during our meeting.
- ☐ Upload your prior year tax return to the RightCapital Vault.

If you have any questions or need any help with anything, please don't hesitate to reach out. I look forward to seeing you soon!

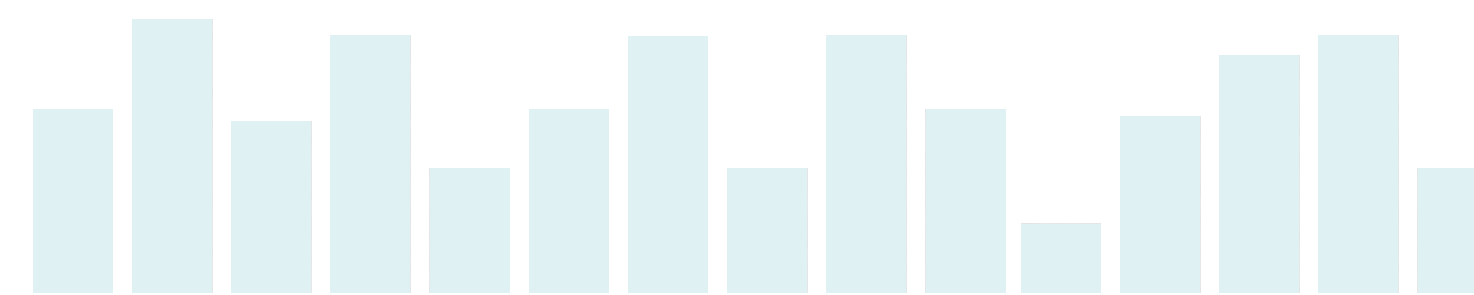
Thank you,
Michael Reynolds

Please let me know if anything has changed and/or if you would like to schedule a meeting. You can use my calendar link to book an appointment any time: <https://elevationfinancial.com/meet>





Pre-meeting Checklist

- Downloadable PDF
- List of items for client to complete before meeting



What event is this?

Mid-year Review,  Zoom,  Phone call

When can people book this event?

90 min, 120 rolling calendar days

Additional Options

Invitee Questions


Name, Email, Location + 1 question





Workflows

Set up automations around your events, such as email and text notifications, thank you emails, etc.

Cancel

Active workflows

If you need to edit or manage workflows for all your event types, visit the [workflows tab](#) 

Name	Applies to	When this happens	Do this	
Pre-meeting Checklist - Mid-Year Review (Reminder #1)	 Mid-year Review	7 days before event starts	Send email to invitee	
Pre-meeting Checklist - Mid-Year Review (Reminder #1) (clone)	 Mid-year Review	1 day before event starts	Send email to invitee	

Cancel

Notifications and Cancellation Policy

Calendar Invitations, No Reminders

Confirmation Page

Redirect after confirmation

Collect Payments

no payment method

Calendly Reminders

- Calendly workflows prompt with reminders to complete checklist

Workflow

Pre-meeting

What's new?

Do you want to send an email to invitees?

Help

Account

Edit: Email to invitee

What email address should this email be sent from?

michael@elevationfinancial.com

Manage your Gmail settings in [Integration settings](#)

Choose a template

Custom

Subject

ACTION ITEMS to prep for Upcoming Meeting: Event Name with Event Organizer Name at Event Time on Event Date

Body

Hi, Invitee Full Name!

I'm looking forward to seeing you for our upcoming Mid-Year Review at Event Time on Event Date.

To prep for the meeting, I have a short checklist of things for you to review and complete here before we meet:

<https://www.elevationfinancial.com/midyearprep>

Please let me know if you have any questions.

Thank you!
Michael Reynolds

☐ Include reconfirmation button

☒ Include cancel and reschedule links

☐ Include cancellation policy

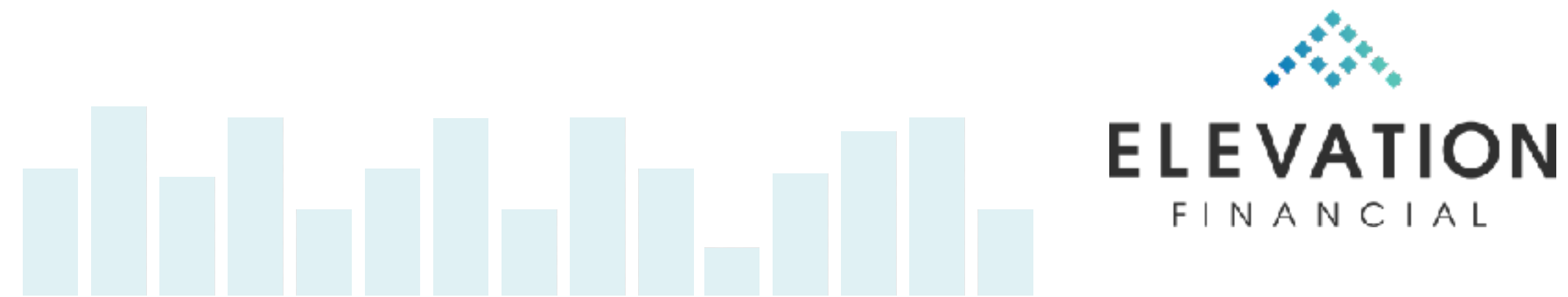
Cancel

Done

Cancel

Reminder Emails

- Reminder email links to checklist



Sample Meeting

Friday, October 22 from 2:00pm - 2:15pm

[Templates](#) | [Collaborate](#) | [Meeting Info](#) | [Private Notes](#)

[Send Agenda](#)

[Send Recap](#)

Me **Meeting Purpose:** What do you plan on accomplishing in this meeting?

General "what's on your mind right now" discussion

Start with any questions or pressing issues on your mind right now.

Take some notes...

Check on open todo items

Add agenda description

Take some notes...

Make sure RightCapital is up to date

- Income
- Expenses
- Debt
- Bank accounts
- Investments
- Previous year tax return

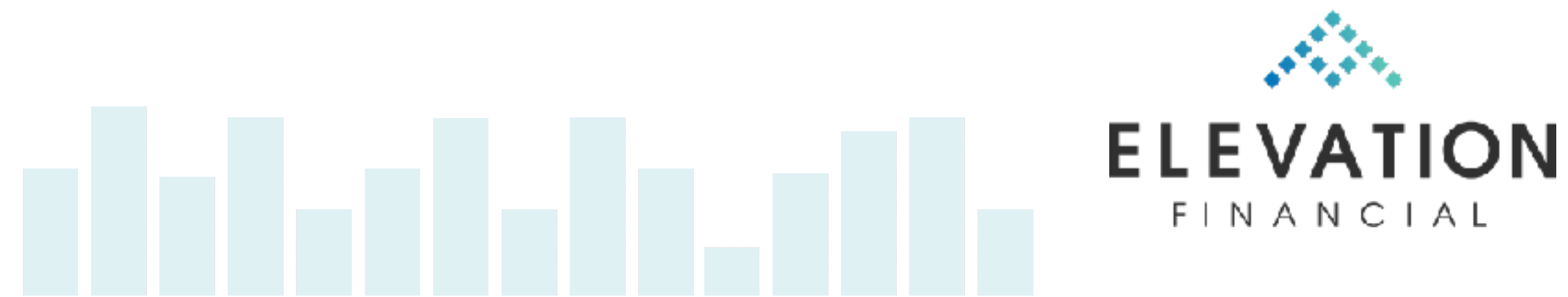
Take some notes...

Review One-Page Financial Plan

- Challenges
- Updates

Mid-Year Review

- Agenda for year-end items to cover



Name:

End of Year Review

Theme:

Select...

Cc:

Search contacts or users...

Bcc:

Search contacts or users...

Subject:

Elevation Financial: End of Year Review

Template Content:

B

I

U

Insert Mail Merge

Hi, {{Contact.Nickname || Contact.FirstName}}!

I hope you're doing well. It's the time of year I like to offer to schedule a meeting to discuss a few topics like:

- Insurance review

- Credit report / cybersecurity

- Budget review and money systems

- Contact info / estate planning / beneficiaries

- Review/update your financial plan

- "Three words" exercise

- Anything else that's on your mind

You can schedule our appointment at:

<https://calendly.com/elevationfinancial/endofyear>



I look forward to connecting soon!

Thank you,

Include the recipient's name in the message using mail merge tags to make it more personal. For example, `{{Contact.FirstName}} {{Contact.LastName}}` will show "Kevin Anderson" in the email. You can also use `{{Signature}}` to display your saved signature.


End of Year Review

- Template email with scheduling link
- Gives preview of what to expect





Michael Reynolds

End of Year Review


 1 hr 30 min


End of year review

Select a Date & Time

November 2021  

SUN	MON	TUE	WED	THU	FRI	SAT
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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				



 Eastern Time - US & Canada (10:54am) ▼

 Troubleshoot

Specific Calendy Event

- Event is specific to end of year review

What event is this?

End of Year Review, ,  Phone call

When can people book this event?

90 min, 90 rolling calendar days

Additional Options

Invitee Questions

Name, Email, Location + 1 question

Workflows

Set up automations around your events, such as email and text notifications, thank you emails, etc.

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Calendar Invitations, No Reminders

Confirmation Page


Redirect after confirmation

Cancel

Save & Close

On confirmation 

Redirect to an external site

Redirect URL * 

https://elevationfinancial.com/endofyearprep

☐ Pass event details to your redirected page. [Learn More](#)

Cancel

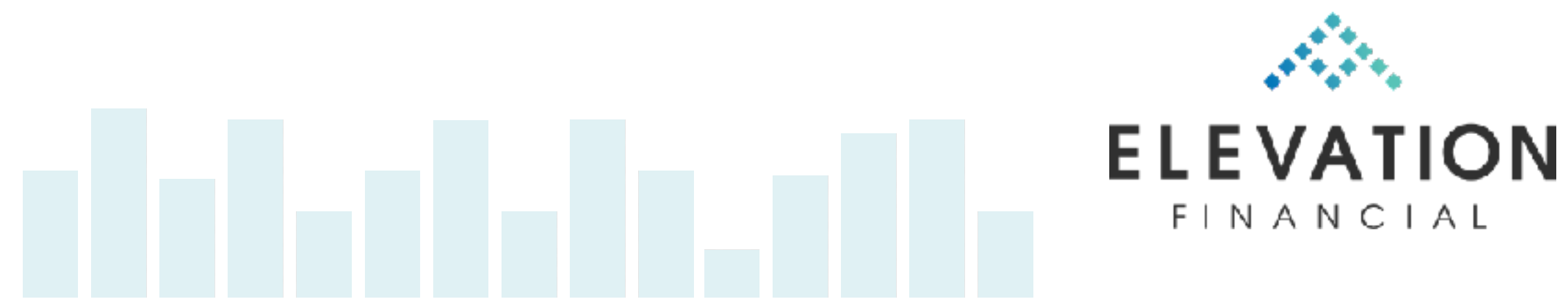
Save & Close

Collect Payments

no payment method

Deliver Checklist

- Confirmation page redirects to checklist
- Host on unique page so that it can be easily changed in one place if needed

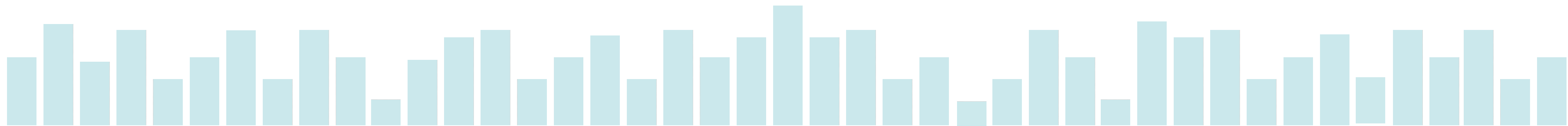


ELEVATION
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Pre-meeting Checklist - End of Year Review

Thanks for scheduling an End of Year Review! I look forward to seeing you soon. Before we meet, I'd like to ask that you complete a few things to prepare for our meeting. You can download the checklist here.

[Download Checklist](#)



END OF YEAR REVIEW

I am looking forward to meeting with you for our upcoming End of Year Review! Here is a checklist of action items that I would like to request that you complete before we meet. If it's not possible or life gets in the way, please don't let it cause you any stress. Do the best you can.

- ☐ Log into RightCapital and update anything that may have changed. Things like **income, debt, expenses**, etc. especially any accounts or debts that have been added manually. Also **fix any banking links** that may need re-authentication and add any new bank accounts that may have been opened. The RightCapital login is: <https://elevationfinancial.com/rightcapital>
- ☐ Request a copy of your credit report(s) at: <https://www.annualcreditreport.com>. Upload the reports from **all three credit bureaus** into the RightCapital Vault.
- ☐ Take a look at your will and basic estate documents and review the wishes and preferences outlined. Upload a copy to the RightCapital Vault if they are not there already.
- ☐ Determine if it has been more than two years since you shopped for rates on auto and home insurance. If so, upload your declarations pages to the RightCapital Vault.
- ☐ Review the Objectives in your One-Page Financial Plan for reference during our meeting.
- ☐ Consider listening to the explanation of the "three words" exercise here: <https://www.elevationfinancial.com/e87-my-three-words-for-2021>

If you have any questions or need any help with anything, please don't hesitate to reach out. I look forward to seeing you soon!

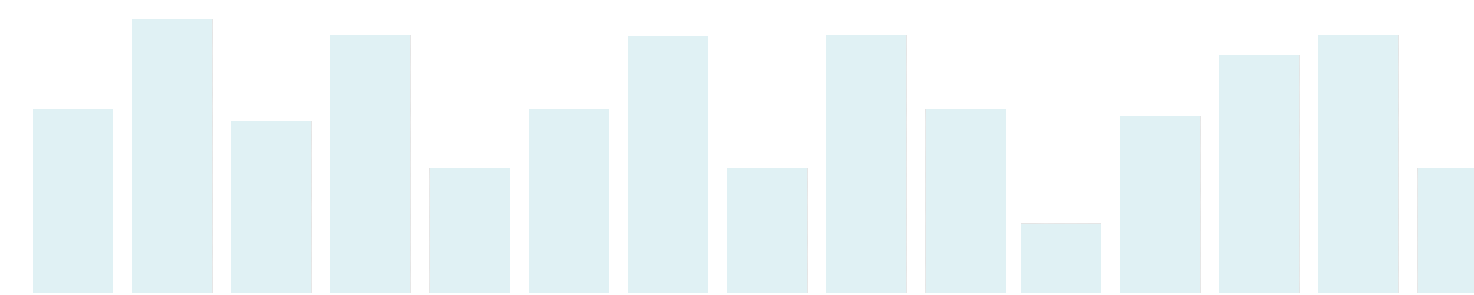
Thank you,
Michael Reynolds

Please let me know if anything has changed and/or if you would like to schedule a meeting. You can use my calendar link to book an appointment any time: <http://elevationfinancial.com/meet>



Pre-meeting Checklist

- Downloadable PDF
- List of items for client to complete before meeting



What event is this?

End of Year Review, Zoom, Phone call

When can people book this event?

90 min, 90 rolling calendar days

Additional Options

Invitee Questions

Name, Email, Location + 1 question

Workflows

Set up automations around your events, such as email and text notifications, thank you emails, etc.

Cancel

Active workflows

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Name	Applies to	When this happens	Do this	
Pre-meeting Checklist - End of Year Review (Reminder #1)	<div><div></div>End of Year Review</div>	7 days before event starts	Send email to invitee	<div><div></div><div></div><div></div></div>
Pre-meeting Checklist - End of Year Review (Reminder #2)	<div><div></div>End of Year Review</div>	1 day before event starts	Send email to invitee	<div><div></div><div></div><div></div></div>


Cancel

Calendly Reminders

- Calendly workflows prompt with reminders to complete checklist

Edit: Email to invitee

What email address should this email be sent from?



 michael@elevationfinancial.com

Manage your Gmail settings in [Integration settings](#)

Choose a template






Custom

Subject

  + Variables

ACTION ITEMS to prep for Upcoming Meeting: Event Name with
Event Organizer Name at Event Time on Event Date

Body

  **B** **I** U    + Variables

Hi, Invitee Full Name!

I'm looking forward to seeing you for our upcoming End of Year Review at
Event Time on Event Date.

To prep for the meeting, I have a short checklist of things for you to
review and complete here before we meet:

<https://www.elevationfinancial.com/endo/yearprep>

Please let me know if you have any questions.

Thank you!
Michael Reynolds

☐ Include reconfirmation button ⓘ
☒ Include cancel and reschedule links ⓘ
☐ Include cancellation policy ⓘ

Cancel Done

Reminder Emails

- Reminder email links to checklist

Sample Meeting

Friday, October 22 from 2:00pm - 2:15pm

[Templates](#) | [Collaborate](#) | [Meeting Info](#) | [Private Notes](#)

Send Agenda

Send Recap

Me

Meeting Purpose: What do you plan on accomplishing in this meeting?

General "what's on your mind right now" discussion

Start with any questions or pressing issues on your mind right now.

Take some notes...

Check on open todo items

Add agenda description

Take some notes...

Make sure RightCapital is up to date

- Income
- Expenses
- Debt
- Bank accounts
- Investments

Take some notes...

Insurance Review

Is insurance coverage still adequate? Has anything changed?

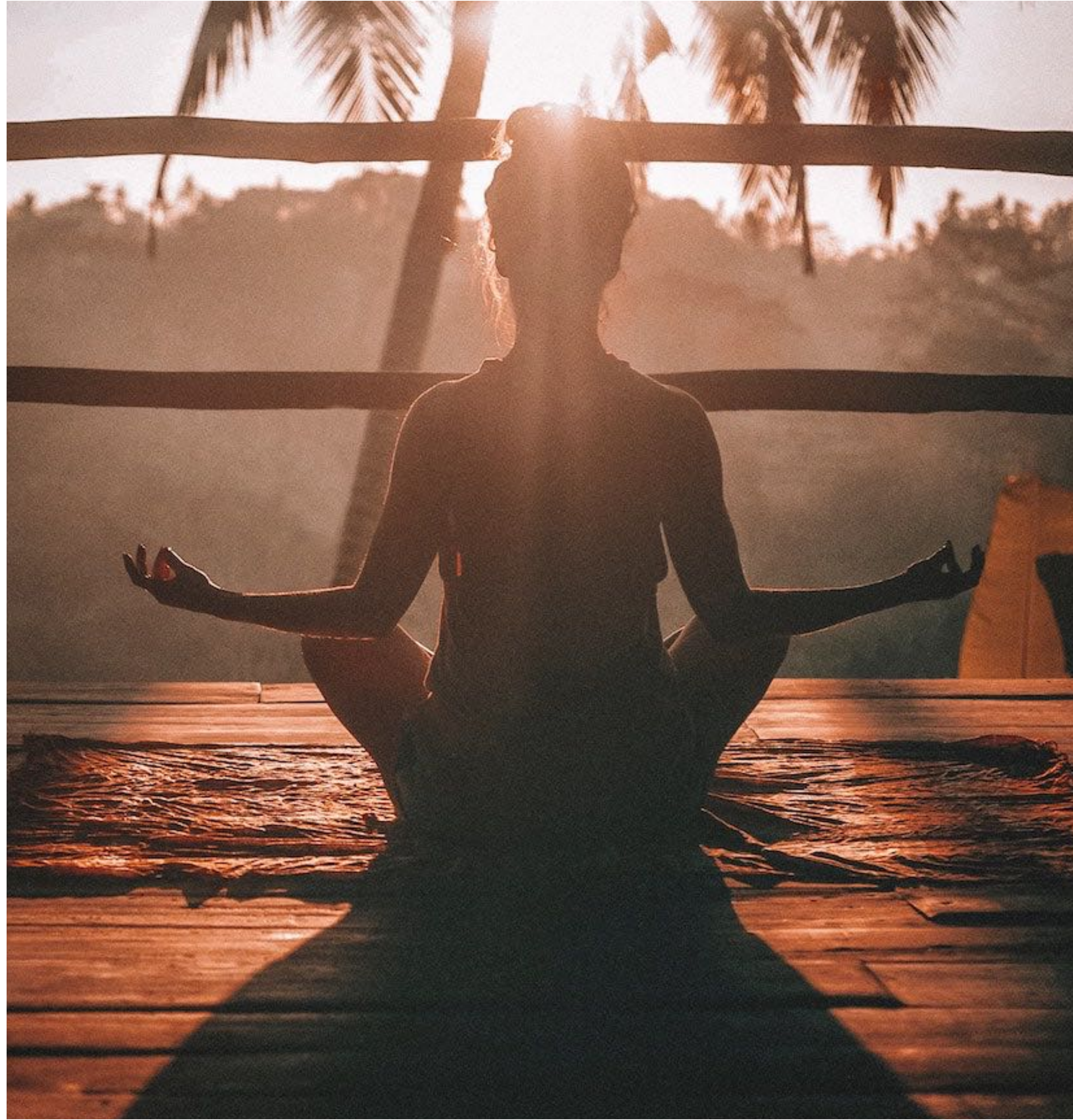
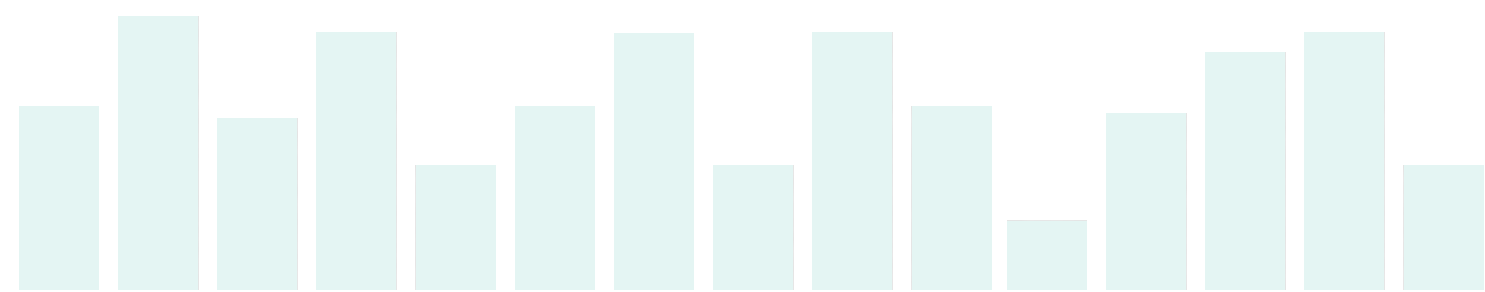
- Life insurance
- Disability

End of Year Review

- Agenda for year-end items to cover

Process = Happy Place

- When decisions and systems are decided in advance, mental cycles are free to focus on the client.
- Tight systems lead to extreme scalability.
- Tweak individual pieces to improve overall service.



HAVE QUESTIONS?

Michael Reynolds - michael@elevationfinancial.com