

What To Expect

What to Expect During Your First Few Interactions



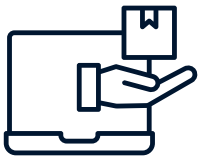
Introduction

Allows for you and TruAdvisors to learn about each other and how working together might be beneficial for you.



Discovery

A meeting to learn about your current financial positions, determine your appetite for investment risk, and to establish your financial goals.



Delivery

A presentation on the implementation of your personalized investment strategy.



Review

An opportunity to review the performance of your investments and to address any necessary changes that need to be made to your investments.

