Colman | Knight

First 3-6 Months of Integral Wealth Initial Engagement

Approximate Sequence of Actions

● = meetings with us ○ = on your own

INTRODUCTION

PORTAL TUTORIAL AND COMMUNICATION PREFERENCES

We will introduce you to the Integral Wealth Portal (IWP) and show you how to log in, upload documents, and connect your accounts. Together we will also go through a communications tool to discern how to make our meetings most effective.

INTERIOR DISCOVERY

I - EXPLORE

Meet with CK Members for 1½-2 hour Zoom conversation. Engage 3 Presencing Scenarios and Heart's Core Grid.

II - CLARIFY

Using insights gained from Phase I, devote personal time to complete Goals for Life.

III - INTEGRATE

With your completed Goals for Life, meet with CK Members to clarify and align your life aspirations with what matters most to you.

ONBOARDING

GATHER DOCUMENTS

Refer to Requested Documents checklist. Collect documents from your files and from your other service providers.

UPLOAD DOCUMENTS

Upload to Integral Wealth Portal Vault > Shared Documents folder.

BUILDING FINANCIALS

With current data, we begin to construct your Foundation Financial Reports.

FINANCIAL FLOWS

INTERIOR MEETS FINANCIALS

Meet with CK Members to view your Foundation Financial Reports and Goals for Life, integrating your money with what matters most, now.

WHAT-IF SCENARIOS

Meet with CK Members for scenario planning, rooted in the discoveries from interior conversations.

INVESTMENT INTEGRITY

RISK QUESTIONNAIRE

Respond to survey from Totum Risk to discover your inherent preferences.

RISK TOLERANCE & IPS

Meet with CK Members to review your Risk Tolerances and write your Investment Policy Statement.

INVESTMENT STRATEGY

We analyze your current holdings and your IPS, proposing a new investment strategy aligned with your clarified goals.

REMAINING MONTHS FOCUS ON YOUR UNIQUE SITUATION AND ALIGNED SERVICES.