

BEHAVIOURAL CASH FLOW MANAGEMENT

Every business has a process -
This is ours!

INITIAL PHONE CALL

This is 5-10 mins of information gathering to figure out if our services are a good fit for your needs. If we are able to help, we will email clients the link to gather personal information.



PRE-APPOINTMENT PHONE CALL

Review of data

- Confirmation of information, source of concerns, etc.

1ST APPOINTMENT VIRTUAL/IN PERSON

- Draft letter of engagement
- Rough out the plan
- Share possible results
- Gain commitment to proceed with plan



2ND APPOINTMENT VIRTUAL/IN PERSON

- Present possible solutions and gain consent to refer to a lender if appropriate.
- Discuss the changes to cash flow.
- Ask for any outstanding detail from clients.
- Prepare the final plan.

3RD APPOINTMENT

- Present plan, reiterate debt structure.
- Present behavioural economics tips to integrate plan into lifestyle