The Target Rock Experience

Welcome to Target Rock Wealth Management. Our client experience is designed to uncover what's important to you and enable us to point your wealth towards its highest purpose.

Phase

1 Tell us what's on your mind. Ask us what you need to know.

In the initial meeting(s), we'll listen for:

- Are our services a good match for your needs?
- Will we enjoy working together?
- What do you really care about?

And we'll let you know:

- Why we do what we do
- How we help point your wealth to its highest purpose
- What we can do for you as a wealth-building partner

If we both feel the benefits of partnership, we proceed to next steps. It's still a conversation, not a commitment.

Client Next Steps

1. Complete our brief risk tolerance and **"Big Why"** questionnaires
2. Send financial statements through secure portal (optional)

Target Rock Next Steps

1. Review your submissions
2. Contemplate your situation holistically

Phase

2 Deepen the conversation

Many facts and feelings will be on the table. It's time to organize them.

- You'll have thoughts or questions that arose since our last meeting. We'll address those first.
- We'll review your questionnaire responses and financial statements and offer our high-level thoughts.

If we're on the same page, we'll discuss how to formalize our partnership

Together, we'll write your "Big Why" statement, a concise declaration of the highest purpose for your wealth - the north star for our work together.

Client Next Steps

1. DocuSign Target Rock Advisory Agreement
2. Complete online financial discovery survey
3. DocuSign account opening forms from our custodian.

Target Rock Next Steps

1. Assist you through the onboarding process
2. Invite you to collaborate in our shared planning and investing workspace

Phase

3 Build wealth together

Take inventory
Your wealth exists in many forms and in many places. We've already started, but let's get a full picture of what we are working with.

Make the clear first moves
There may be low-hanging fruit we can harvest quickly – good ideas that we don't need a full-blown financial plan to see.

Get financially organized
We'll help direct your income and position your investments in true alignment with your "Big Why". We can also help with tax planning, wills, insurance and more.

Start answering "when can I..."
We'll connect your "Big Why" to the anticipated outcomes of the financial planning and investment actions we will take.

Proceed as wealth-building partners
Target Rock will co-pilot the financial management vehicle we built together, and help you keep it finely tuned through the years.