

# Due Diligence Process



Strategies



Funds



Products



Services



How Do Financial Advisors at RFG Build Recommendations?

1. Specialist reviews options.
2. Specialist develops recommendations.
3. Team reviews and challenges recommendations.

**Corporate  
Structure**

1. Financial stability/strength of balance sheet.
2. Number of years in business.
3. Vision/direction of company

**Strategy  
Evaluation**

1. Model/Philosophy.
2. Thought leader.
3. Dedicated to the space

**Cost**

1. Program fees.
2. Processing fees.
3. Other fees.

**Administration  
Services**

1. Cash management.
2. Tax management.
3. Technology integration.

**Final Recommendation**