What to Expect...

Now that we are in the implementation phase of our process, we'd like to provide a timeline of what to expect over the next 90 days, the next year and beyond.

FIRST TWO WEEKS

- Welcome call. One of our principals will reach out and welcome you to the RFG Family!
- Welcome email and updates from your dedicated operations team. This will include contact info for your team members and a reference piece entitled “Connecting Me To My Money.”
- Welcome packet via mail.
- Mail from our broker/dealer, Cambridge Investment Research Inc. and your custodian. While we can minimize ongoing mail, some initial and ongoing correspondence are required by mail.
- Phone interview with insurance company or call to schedule paramedical exam (insurance only). -if applicable

30 DAYS

- Monthly newsletter and economic updates.
- Welcome emails highlighting online access and the services critical to a comprehensive plan.

90 DAYS

- Advisor call. Your lead advisor will reach out to you to clarify anything related to statements, online access, (and other items requiring attention.)
- Proactive reviews will be performed, whether we meet in person or not, by your lead advisor and team every 90 days. Expect to receive a confirmation email upon completion and your advisor will let you know if there are items that need attention.

ONGOING

- Update meetings will be performed annually face-to-face. This is the opportunity for us to confirm goals and objectives and keep your plan up to date.
- Hiccups. We will do everything we can to make this as smooth a process as we can. However, this is a complex, highly regulated business that is ever changing. All the moving parts occasionally will result in new paperwork requirements, data feed issues or two vendors not syncing well. As you would expect, our promise is to keep you informed. Your flexibility and understanding as well as your accessibility will help us to expedite this process as quickly as possible and overcome any challenges we may come across.
- Conviction in your strategy. Fear and anxiety are two emotions that may creep into the picture occasionally when we are seeing the markets move sharply in one direction or another. We review economic indicators and asset allocation regularly and make changes consistent with your strategy and objectives. We believe in staying the course and following the plan we have constructed. Remember that the portfolio was built for you, your family, your time horizon, your risk tolerance and your financial plan. It’s all about YOU!