

# RFG *ProActive Review*:

*A comprehensive review of each client's plan. The review will follow fiduciary standards and utilizes the expertise of the entire team.*

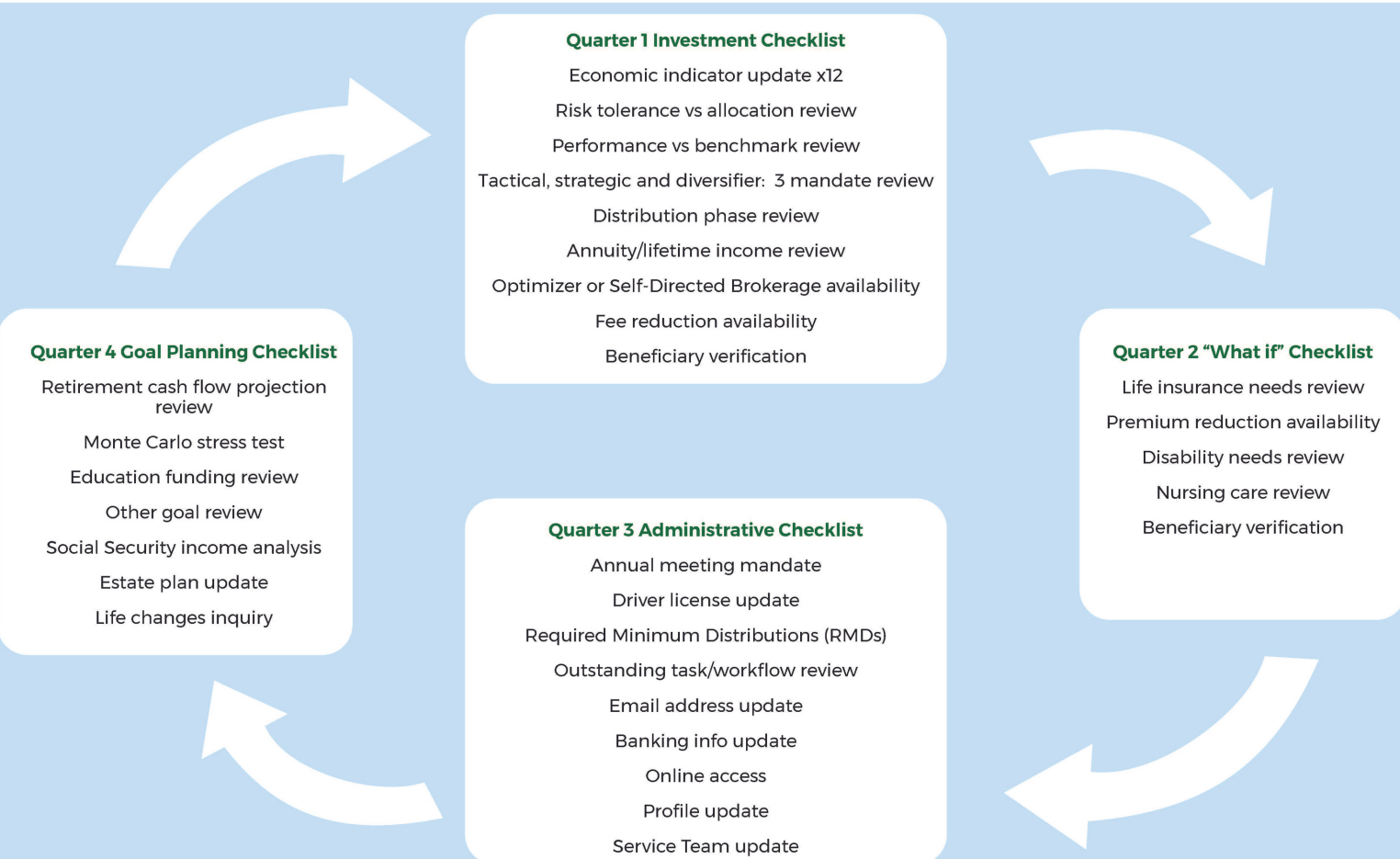


## **ProActive Review Objectives:**

- **Process:** We follow a systematic process incorporating fiduciary standards.
- **ProActive:** Our ProActive Review process ensures periodic oversight and monitoring. Our team will provide ongoing updates.
- **Team:** The Rosselot Financial Group collaborates to provide greater insight.

## **ProActive Review Process:**

Once we have implemented a plan and established accounts, our ongoing engagement includes monitoring. We have a process in place where your service team reviews your profile thoroughly each quarter. We have adopted strict standards to make sure things do not fall through the cracks. You will be communicated with throughout the process and we are always available for other things that may pop up, as we know that will happen, it is a part of life. Just know that when things are quiet, we are working hard each Wednesday morning to make sure your plan is on track.



Timing of the *ProActive Review* varies based on service model.

The Rosselot Financial Group believes the *ProActive Review* is critical to a client's success. Our team dedicates over 1,000 hours annually to the *ProActive Review* Process. That's 4 times as much as we spend acquiring new clients.

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