Fiduciary Consulting Project

ALLODIUM®
INVESTMENT CONSULTANTS

INSTITUTIONAL INVESTORS – FIDUCIARY CONSULTING

1 VALUES MEETING

OUR PURPOSE:
Determine if we may be a match

Meeting duration: 1 hour

WHAT WE DO:

- We learn what's important to you
- We learn why you are seeking a fiduciary consultant

WHAT YOU DO:

- You learn about our services
- You learn how we are compensated

2 DIAGNOSTIC MEETING

OUR PURPOSE:
Understand you and your financial goals

Meeting duration: 2 hours

WHAT WE DO:

- We ask questions to learn your story (goals, organization, background, history, etc.)
- We assess your risk profile

WHAT YOU DO:

- You provide your financial documents
- You share your financial goals and objectives

3 FIDUCIARY PLAN MEETING

OUR PURPOSE:
Share the written fiduciary plan with you

Meeting duration: 2 hours

WHAT WE DO:

- We present your fiduciary plan and fiduciary consulting opportunities
- We explain fees and any tax implications

WHAT YOU DO:

- You ask questions
- You are able to request more information about your fiduciary plan

4 ACTION PLAN MEETING

OUR PURPOSE:
Align and initiate your fiduciary plan

Meeting duration: 1 hour

WHAT WE DO:

- We provide you with an action plan based on our meeting with you
- We address all of your questions

WHAT YOU DO:

- You confirm your fiduciary plan decisions
- Learn how to implement your action plan

5 FOLLOW-UP PHONE CALLS

OUR PURPOSE:
Answer all of your questions

Service duration: 90 Days

WHAT WE DO:

- We are available via phone to answer any follow-up questions
- We introduce you to outside specialists

WHAT YOU DO:

- You ask questions
- Implement your fiduciary plan
- Contact your Allodium fiduciary consultant