Queenvest

HOW WE DELIVER OUTSTANDING SERVICE TO OUR CLIENTS

New Client Onboarding Steps

- **WEEK 1** — Sign QV Agreements
- **WEEK 3** — Vision Meeting
- **WEEK 5** — Get Organized Meeting
- **WEEK 7** — Strategy Meeting
- **WEEK 8** — Investment Meeting
- **WEEK 9+** — Ongoing Financial Management

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6 Planning Areas

CASH FLOW PLANNING
Start watching your money closer, be aware of where it's going and keep more of your money for your big goals

INVESTMENT PLANNING
Invest your money in many types of assets to maximize return, minimize risk and achieve your passive income goals

TAX PLANNING
Multi-year strategic planning to reduce taxes throughout your lifetime

INSURANCE PLANNING
Protect what you've worked so hard to build with proper risk management

RETIREMENT PLANNING
Have enough income every day of your retirement

ESTATE PLANNING
Have the right structure and documents in place that reflect your wishes and intent for the next generation

Queenvest

CONSIDERING OUR FIRM

We’re happy and honored that you’re considering our firm as your trusted partner to help you live in abundance and retire with grace.

To make sure we’re the right fit for each other, we have a 5-step process that helps us better understand and identify your needs while you learn more about our services.

LEARN MORE CALL
A 15-minute call will give both of us a chance to make sure your situation matches our expertise. After all, you wouldn’t see a Cardiologist if you need a knee surgery.

DEEPER DIVE MEETING
The next meeting is a 75-minute Zoom where we’ll get real clear on your financial goals, needs, and concerns.

POSSIBILITIES MEETING
We’ll meet for the second time to discuss the plan we put together and explain exactly what you need to do to achieve your financial goals.

THINK ABOUT IT
We plan to work with you for decades, not a quick transaction. It’s important that you take as much time as you need to make your decision.

WELCOME ABOARD
We’ll setup a quick call to go over our onboarding process and what you can expect in the first year with us.