

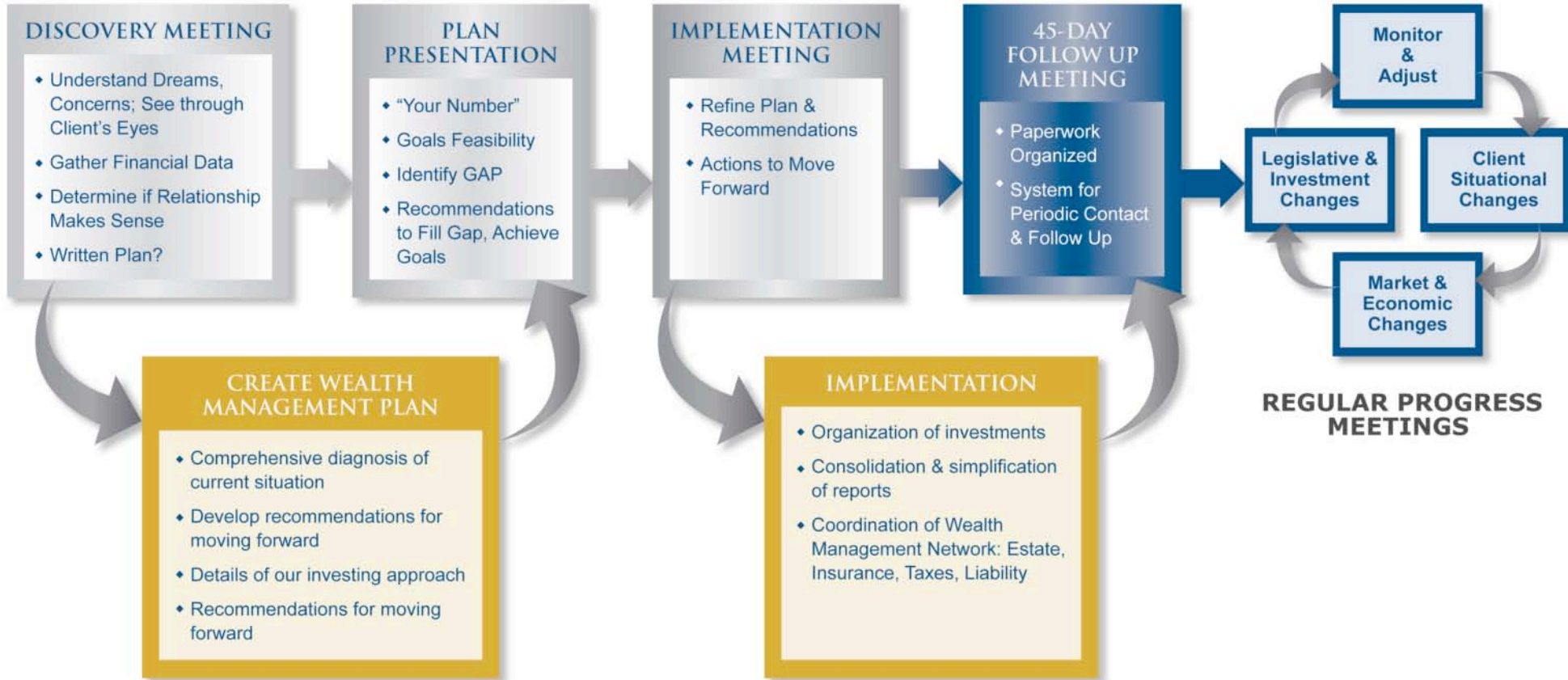
Wealth Management Consultative Process

TWO WEEKS

ONE WEEK

45 DAYS

**90 DAYS
AS NEEDED**



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