QUILITY | Financial Advisors

Prepare For Your Quility Financial Advisors Appointment

You're on your way to resetting your financial future with QFA! We've brokendown the reset process into the following four appointments. Please read below to get an idea of what to expect during each appointment with your advisor and what items to bring with you.

1st Appointment

WHAT TO EXPECT

You and your advisor will review your financial statements and discuss liabilities, bills, mortgages, car payments, credit cards and your financial situation as a whole. Your Quility Financial Advisor will walk you through a **risk assessment questionnaire.**

WHAT TO BRING WITH YOU

- **All relevant financial statements** *(investment accounts, including annuities and life insurance)*
- **Prepare to discuss liabilities** *(bills, mortgages, car payments, credit cards and your outstanding debts)*

2nd Appointment

WHAT TO EXPECT

Your Quility Financial Advisor will review your **risk assessment and do a statement review.** If they have any proposed changes from the first appointment, you will have an opportunity to **discuss and review those changes. Clients receive an email with onboarding and a client profile form.**

3rd Appointment

WHAT TO EXPECT

Your Quility Financial Advisor will **present your final proposal and answer any questions.**

4th Appointment

WHAT TO EXPECT

Your accounts will be opened and your Quility Financial Advisor will **review the placements of your portfolio.**

Beyond the Appointments

WHAT TO EXPECT

Following your fourth appointment, you will have **weekly interactions with Quility Financial Advisors**. You can reach our advisors Monday-Saturday.