

THE JUMET FINANCIAL ROADMAP



YOUR FINANCIAL JOURNEY WITH JUMET FINANCIAL

INTRODUCTION & EDUCATION

- At Jumet Financial, we are eager to get to know you and your financial goals.
- Education is a cornerstone of our planning process, and we are committed to equipping you with valuable industry insights.
- As we learn more about your aspirations, we craft a personalized roadmap tailored to your needs.
- We lay the groundwork with clear expectations, helping you feel confident and prepared as you begin your financial journey with us.

THINKING THINGS OVER

- Choosing the right financial advisor is an important and sometimes stressful decision.
- We encourage you to take your time to ensure we are the right fit for your needs.
- As you reflect on our conversation, please feel free to reach out with any additional questions – we are here to help.

NEXT STEPS & PLAN MAINTENANCE

- Jumet Financial is intentional, transparent, and consistent in our communication.
- We assist you in finding the right advisor to work toward your needs and goals.
- We clearly outline actionable steps to help you achieve the lifestyle you desire.

DECISION & ONBOARDING

- Thank you for trusting us to guide you toward your financial goals.
- At Jumet Financial, we take pride in our excellent client service.
- A member of our team promptly begins the onboarding process.
- We ensure you receive the support and answers you need every step of the way.

PLAN IMPLEMENTATION

- “Where sparks fly and wheels turn.”
- We remain in constant communication as we put your financial plan into action.
- We help you work toward your goals with a proactive approach.
- We schedule your next meeting or call to ensure steady progress toward your financial future.

www.jumetfinancial.com

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