

Stewardship Framework



AAA	AA	A	B	AF
<p>Client Service Offering:</p> <ul style="list-style-type: none">▪ Strategy and Tactical Meeting▪ F.O.R.M Update▪ MGP Update▪ Moments of Truth▪ Newsletter Email▪ Client Appreciation Event▪ Ideal Client Reception▪ 7-Pillars Consulting <p>What You Can Expect:</p> <ul style="list-style-type: none">▪ Strategy & Tactical Meeting:<ul style="list-style-type: none">◦ Semi-annual◦ Review of holdings◦ Recap of prior year◦ Plan review◦ Review goals & objectives▪ F.O.R.M. Update:<ul style="list-style-type: none">◦ Quarterly◦ Review of F.O.R.M. goals▪ MGP Update:<ul style="list-style-type: none">◦ Annually▪ Moments of Truth:<ul style="list-style-type: none">◦ As needed▪ Newsletter Email:<ul style="list-style-type: none">◦ Every two weeks▪ Client Appreciation Event:<ul style="list-style-type: none">◦ Annually▪ Ideal Client Reception:<ul style="list-style-type: none">◦ Annually▪ Annual Calendar	<p>Client Service Offering:</p> <ul style="list-style-type: none">▪ Strategy and Tactical Meeting▪ F.O.R.M Update▪ Moments of Truth▪ Ideal Client Reception▪ 7-Pillars Consulting <p>What You Can Expect:</p> <ul style="list-style-type: none">▪ Strategy & Tactical Meeting:<ul style="list-style-type: none">◦ Semi-annual◦ Review of holdings◦ Recap of prior year◦ Plan review◦ Review goals & objectives▪ F.O.R.M. Update:<ul style="list-style-type: none">◦ Quarterly◦ Review of F.O.R.M. goals▪ Moments of Truth:<ul style="list-style-type: none">◦ As needed▪ Ideal Client Reception:<ul style="list-style-type: none">◦ Annually▪ Annual Calendar	<p>Client Service Offering:</p> <ul style="list-style-type: none">▪ Strategy and Tactical Meeting▪ F.O.R.M Update <p>What You Can Expect:</p> <ul style="list-style-type: none">▪ Strategy & Tactical Meeting:<ul style="list-style-type: none">◦ Annually◦ Review of holdings◦ Recap of prior year◦ Plan review◦ Review goals & objectives▪ F.O.R.M. Update:<ul style="list-style-type: none">◦ Annually◦ Review of F.O.R.M. goals▪ Annual Calendar	<p>Client Service Offering:</p> <ul style="list-style-type: none">▪ Strategy and Tactical Meeting <p>What You Can Expect:</p> <ul style="list-style-type: none">▪ Strategy & Tactical Meeting:<ul style="list-style-type: none">◦ Every two years◦ Review of holdings◦ Recap of prior year◦ Plan review◦ Review goals & objectives▪ Annual Calendar	<p>Client Service Offering:</p> <ul style="list-style-type: none">▪ Strategy and Tactical Meeting <p>What You Can Expect:</p> <ul style="list-style-type: none">▪ Strategy & Tactical Meeting:<ul style="list-style-type: none">◦ Annually◦ Review of holdings◦ Recap of prior year◦ Plan review◦ Review goals & objectives▪ Annual Calendar

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