BONA FIDE FINANCE

FINANCE IN GOOD FAITH

NEW CLIENT CHECKLIST

- ☐ Accept terms of proposal for services
- ☐ Receive welcome email from the Bona Fide Finance team
- ☐ Read through and sign the Client/Advisor Engagement Agreement
    - Advisory Agreement, ADV, and Privacy Statement
    - Client Information
    - Advice Pay (invoice emailed to you for payment)
- ☐ Access Right Capital and follow instructions for uploading your information
    - We request that pertinent information/documents are uploaded **a minimum of 48 hours prior** to your scheduled meeting with Ben
- ☐ Schedule first formal meeting with Ben via ScheduleOnce
- ☐ Complete the Vision, Values, and Goals Assessments
    - Life Planning Questions
    - Financial Satisfaction/Perspectives Surveys
- ☐ Attend first meeting with Ben!