Remaining Steps

*Please print this document and use as your checklist.*

1. ( ) The email you received consists of various documents. Please return:

* 1. Signed agreement
  2. Additional forms as specified by the email (if mailed, we recommend photocopying the forms should they get lost)
  3. Any paperwork, including latest statements

1. ( ) After we receive your returned packet of information, the data will be input. A second email will be sent asking that all inputted information be checked. Review thoroughly, as faulty data will impact the results of the plan. This email will include the following documents:
   1. *Retirement Update –* This report provides various retirement projections and summarizes the data that you provided.
   2. *Client Confirms Volatility Tolerance and IPS* – This report allows you to modify your volatility tolerance. It also presents your Investment Policy Statement (IPS), which governs your investment program.
2. ( ) Contact us with changes, if any, that should be made to the prepared data and assumptions*.* Fax or scan/email back the signed *Client Confirms Volatility Tolerance and IPS* to our office.
3. ( ) After we receive your updated documents, it is time to have our second meeting together. The objectives for this meeting are as follows:
   1. Discuss the above mentioned reports. Decide how best to implement these plans, and discuss tax implications, if any.
   2. If you wish to open up an account at Charles Schwab through us*,* we will assist in the completion of the necessary paperwork including account applications and transfer forms. We will also setup, if desired, electronic delivery and online access of your account.

On those accounts not setup through us at Charles Schwab*,* you have sole authority. Contour Financial has no access over these types of accounts, so implementing recommended changes are solely your responsibility.

1. ( ) After the second meeting we will:
   1. If you have opened an account at Charles Schwab through us, we will make certain your assets transfer in a timely fashion. When they arrive, we will implement the new investment positions*.*
   2. Stay in touch per the *Calendar of Events* sub-tab.