# NUDGE CLIENT LIFECYCLE

**brunch & budget®**

## Search — STEP 1

You find us! Clients discover us in various ways, some of which include:

- Google search
- Yelp
- Word-of-mouth
- Social media
- Workshops
- Virtual Brunches
- Quick 15s

## Sign-up — STEP 2

To get started with us you complete the form in MoonClerk, our payment portal, where you will:

- Read the program description and agree to our terms
- Provide your personal info
- Pay for your first month

Upon completion, you are directed to sign your Client Agreement and to schedule your Tech Call.

## Onboard — STEP 3

One week before your scheduled Tech Call, you will receive emailed invites to the following technology platforms:

- *MoneyGuidePro (MX)*
- *MeisterTask (MT)*
- *FileCloud*

You will have tasks assigned to you in MeisterTask which you will want to look at before your scheduled Tech Call.

## Tech Call — STEP 4

This is the **first** of the five **Strategy Calls** that you will have during the 2-month program.

During this call, an **Associate Planner** will walk you through the various technology platforms we use so that you're able to make the most out of the tools and resources we provide.

## Core Values Call — STEP 5

This is the **second** of the five Strategy Calls and it is the first call with your assigned Planner.

During this call, we'll dive into a discussion about your goals and priorities and explore your relationship with money by identifying your **Money Personality**. We'll also introduce the **Core Values Formula** and the **Recipe for Wealth**.

## Five Stages Call — STEP 6

This is the **third** of the five Strategy Calls.

During this call, we'll start shaping your **Recipe for Wealth** and making a plan to tackle all of the tasks in each of the **Five Stages to Financial Legacy**.

## Cash Flow Call — STEP 7

This is the **fourth** of the five Strategy Calls.

During this call, we'll get a clear picture of where your money is going. We'll accomplish that by reviewing your financial transactions and showing you how we track your income and expenses each month.

## Recommendations Call — STEP 8

This is the **fifth**, and final, Strategy Call.

During this call, we'll discuss the steps you can take for continued progression through the **Five Stages**. We'll also tie up any loose ends from previous calls so that you have a clear understanding about how to move forward on your own.