

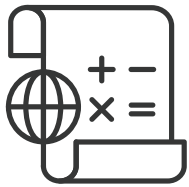


## What to Expect During The First Few Interactions



### INTRODUCTION

Allows for you and Truadvisors to learn about each other and how working together might be beneficial for you.



### DISCOVERY

A meeting to learn about your current financial positions, determine your appetite for investment risk, and to establish your financial goals.



### DELIVERY

A presentation on the implementation of your personalized investment strategy.



### REVIEW

An opportunity to review the performance of your investments and to address any necessary changes that need to be made to your investments.