

## JYC's typical Wealth Management (WM) Strategies Roadmap with clients

### Discover

Face-To-Face Client Discovery Meeting



### Create

Open account

Determine Investment Policy Statement

Determine Advice & Service Scorecard

Present investment proposal

Determine Wealth Planning Roadmap



### Build

Invest accordingly

Meet with suitable TD specialists, if needed

Present and implement WM strategies



### Review

Regular phone call review

Face-To-Face Annual Client Meeting



### Manage

Manage and rebalance investment portfolio due to major events or fundamental changes



Manage WM Roadmap and continuous review of client's Advice & Service Scorecard