THE SYMPHONY PROCESS

SYMPHONY FINANCIAL
NORTHWESTERN MUTUAL PRIVATE CLIENT GROUP

DISCOVER

- Get to know each other.
- Understand your current financial position.
- Identify your goals and priorities.
- Agree to next steps or Second Opinion.

1 Hour
Initial Meeting

PLAN

- Review draft plan.
- Check for relevance and accuracy.
- Determine impact of value proposition.
- Develop a detailed plan for engagement process.

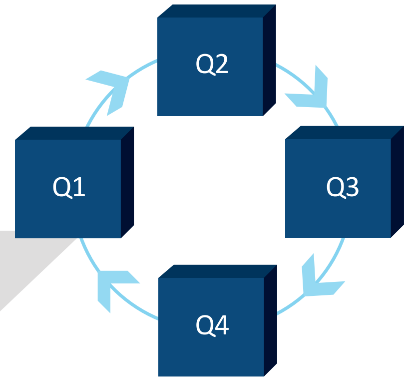
1-2 Hour
Planning Meeting(s)

IMPLEMENT

- Onboarding process and execution
- Review and implement plan.
- Review schedule and touchpoints.
- Deliver detailed financial plan.

1 Hour
Implementation Meeting

REVIEW



- Conduct regular review meetings.
- Implement plan changes.
- Market, industry and economic updates

Regular Review
and Update Meetings

BETTER QUESTIONS › BETTER SOLUTIONS › BETTER LIFE WITH CLARITY AND CONFIDENCE

Our insurance solutions are best-in-class, and while not guaranteed, we continue to lead the industry in paying dividends to our policyowners.

Effective financial planning isn't just about getting a favorable return on your portfolio— It stems from having clarity about where you are now, confidence about where you're going, and quality resources to help you get there. Our process is designed to continuously ask you **better questions** so we can offer **better solutions** so you can live a **better life with clarity and confidence.**