Comprehensive Financial Planning Process

- **Client**
  - Make an appointment
  - Initial consultation 2 hr
  - Strategy 1 hr
  - Check draft strategy paper 1 hr

- **Advisor**
  - Make strategy appointment
  - Strategy presented
  - SOA briefing 1 hr
  - Check SOA 0.5 hr

- **Financial Planner**
  - Prepare final SOA
  - Prepare SOA 0.5 hr

- **Support**
  - Publish strategy paper 0.5 hr
  - Make SOA appointment 0.25 hr
  - Complete documentation 0.25 hr
  - File documents 0.25 hr

- **Compiles documentation**