



The Bayntree Blueprint

7-10 Days

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30-45 Days

Discovery Visit

Complete discovery process understanding goals and/or concerns

Review your current:

- Income plan
- Investment plan
- Tax strategies
- Health Care plan
- Legacy plan

Strategy Visit

Diagnostic of current portfolio:

- Risk analysis
- Cost analysis
- Income analysis
- Social Security analysis
- Annuity analysis



**Engage with
Bayntree Wealth Advisors.**

Implementation Visit

Details of constructing your retirement income plan:

- Income plan
- Investment plan
- Advanced planning
 - Tax strategies
 - Health Care plan
 - Legacy plan

Plan Delivery Visit

- Review structure of plan
- Review expectations
- Review accounts
- Review initial statements & website login
- Establish regular review process
- Implement advanced planning

7001 N. Scottsdale Rd. Suite 2055 Scottsdale, AZ 85253 • 480.494.2750 • Bayntree.com