Vibrance Wealth Management LLC
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Initial Consultation

What To Expect

Step 1: A complimentary 30-minute phone consultation

We like to learn more about your background and what specific financial areas concern you the most. This will allow us to mutually decide if we are a good fit to work together.

Step 2: A complimentary 60-minute in-person consultation

If we believe you can benefit from our wealth management services, we will set up an in-person meeting within two weeks of our phone consultation so that we can conduct a more in-depth analysis of your current situation.

If you are a couple, both of you will need to attend the meeting so that we can get a full picture of your family and financial situation.

Before the meeting, you will need to fill out our Initial Consultation Questionnaire. You can download the questionnaire from Vibrance Wealth Management's Website www.VibranceWealth.com under Resources. It is recommended that you email the completed questionnaire to us at lchan@vibrancewealth.com before our meeting. Or, you can bring it to our meeting. We will keep the information private and confidential.

After the meeting, you will have an understanding of:

- Our wealth management approach, financial planning process and investment philosophies
- Our services that can benefit you
- The fee structure for our wealth management services

There is no obligation to move forward together after going through these two steps. If you feel we can be a good team, then we can proceed to the next step, which is to establish our financial advisory relationship.

Looking forward to our conversation. Thank you!