Welcome to Financial Gravity Transition Overview

- Alignment Sessions with FG Specialist
- FG Team Kickoff: Transition Introduction
- Transition Planning Meetings with the FG Team
- Marketing Planning and Webinar Rehearsals

Phase One - Planning for Success

The initial phase of our partnership includes introductory and planning meetings with our dedicated teams. During this time, you'll receive a comprehensive outline of our transition process and collaborate with us to create a customized transition plan and timeline specific to your business. This is also the phase where you'll begin gathering client data and preparing a transition template provided to you, allowing our team to create transition packets for your clients.

- Official Registration & Technology Kickoff Call
- Client-Focused Webinar
- Book of Business Transition with Dedicated Support

Phase Two - From Planning to Performance

This second phase is where the action begins. All the planning we've done so far now moves into execution. We'll get you registered with the firm, host a welcome webinar for your clients, and begin sending out the necessary onboarding documents to you and your clients. Our goal is to streamline the transition process and make it as seamless as possible—for both you and your clients.

- Pathway to Growth Training
- FG Client Check-In Calls
- Dedicated Client Service Support
- Automated Annual Review Workflow

Phase Three - Integrated Family Office Execution

The final phase is about fully leveraging our family office platform. You'll receive one-on-one training to get up to speed with our software and processes while your clients will get a welcome call to walk through our systems. Going forward, you'll also have access to our servicing team, allowing you to focus on what matters most—your clients. This includes support with annual review invitations and preparation of documents for your client meetings.

Financial Gravity