STREAMLINED WEALTH PLANNING

CLIENT

WELCOME PACKET

www.streamlinedwealthplanning.com

2038 Vermont Dr. Suite 201
Fort Collins, CO 80525

WELCOME

Andrea, Megan, Ryan, Marissa & Courtney

Welcome to Streamlined Wealth Planning! We are delighted to have you here. Our team comprises experienced advisors who prioritize integrity and transparency, always putting your best interests first in our recommendations and strategies.

Our signature process, called **The Stream Guide** takes the guesswork, agony, and fear out of wealth planning. You deserve a wealth plan that pursues your goals and ambitions.

This new client welcome packet will help guide you during your onboarding process. Please don't hesitate to reach out if you have any questions.

Streamlined
WEALTH PLANNING

MEET YOUR ADVISOR TEAM

Ryan McNulty, CFP®

Founder & Wealth Advisor

ryan@streamlinedwealthplanning.com

Ryan entered the industry in 2007, commencing his career as a Financial Advisor at Waddell & Reed. In the subsequent years, he mentored new advisors and managed the Northern Colorado market. In 2018, Ryan returned to his passion of client wealth advising. Ryan specializes in comprehensive wealth planning for individuals & families.

Megan Frahm, AWMA

Wealth Advisor

megan@streamlinedwealthplanning.com

Megan began her career in late 2011. She holds the Accredited Wealth Management Advisor or AWMA® designation, which is a course of study encompassing wealth strategies, equity-based compensation plans, tax alternatives, and asset preservation alternatives. Megan specializes in helping women and families in comprehensive wealth planning. She prioritizes educating her clients throughout the entire process.

Courtney Bradshaw

Wealth Advisor

courtney@streamlinedwealthplanning.com

Courtney's financial career began in 2011, and she specializes in providing comprehensive wealth planning for women, families, and the farming and ranching community. Her primary focus is to bring clarity, organization, and confidence to her clients' financial lives.

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WEALTH PLANNING

MEET YOUR SERVICE TEAM

Andrea Broman

Client Relations Manager

andrea@streamlinedwealthplanning.com

Andrea is the first face you will see at Streamlined Wealth Planning. She coordinates your meetings with your advisor and ensures that your transactions with Streamlined Wealth Planning and our service partners run smoothly.

Marissa McNulty

Operations Manager

marissa@streamlinedwealthplanning.com

Marissa helps run our business behind the scenes, so that our wealth advisors can focus on our client's financial well-being. She also coordinates our client events & workshops.

HOW IT WORKS

Providing Financial Freedom Amidst Life’s Uncertainty
At Streamlined Wealth Planning, we believe in truly listening to our clients. We strive to understand your “why”, your aspirations for how you want to live, give, and leave your legacy. Our approach goes beyond conventional, cookie-cutter services. Each wealth plan we craft is meticulously designed to reflect your unique needs, values, and circumstances, ensuring that it is perfectly tailored for you and your family.

Our goal is to provide a solid foundation of financial freedom and resilience, so that no matter what life throws at you, your financial well-being is one less thing you have to worry about. With our professional guidance, you can navigate life's uncertainties with confidence, knowing that your financial future is sound.

As a Streamlined Wealth Planning client, you may receive communication from these three entities. Here is a description of each and how we work together.

LPL Financial

LPL Financial is a wealth management firm that serves as an independent broker-dealer, RIA custodian, and/or provider of third-party services for financial professionals, RIA firms, and institutions. LPL provides technology, investment solutions, and services to support these financial professionals and their clients.

Streamlined Wealth Planning

Streamlined Wealth Planning is Ryan McNulty’s independently owned and operated wealth planning firm in Fort Collins, Colorado.

Ryan McNulty, Megan Frahm, & Courtney Bradshaw

Ryan, Megan, & Courtney are your wealth advisors at Streamlined Wealth Planning.

Streamlined

WEALTH PLANNING

NEW CLIENT STREAM GUIDE

Our step by step meeting guide for your wealth planning journey.

01

Explore

Our Explore call or meeting is designed to see what working with Streamlined Wealth Planning looks like.

We will get to know you and what you're looking to accomplish. If we're a good fit, we'll schedule your Discover meeting.

02

Discover

Our Discover meeting is an in-depth discussion about your life and philosphy around money. This is where we learn your "Why".
After signing the necessary documents to become a client, you will start your journey with the Stream Guide & your Wealth Advisor.

03

Gather

Our Gather meeting is a data gathering session where we will ask to see everything that touches money in your life.

These documents allow us to create a personalized wealth plan that is customized to you.

04

Plan

Our Plan meeting is a presentation of your personalized wealth plan.

Your comprehensive plan will be tailored to your "Why" and encompass the Stream Guide principles.

05

Action

Our Action meeting is when we implement the recommendations and changes from your wealth plan.

06

Life, Streamlined

We will consistently evaluate your needs and, with your approval, make modifications to improve and optimize your Streamlined life.

STREAMLINED WEALTH PLANNING

THE STREAM GUIDE

Our signature process designed to help you pursue your Streamlined life.

WHY
As your wealth guide, we want to know what's your WHY? Where do you want to go, what do you want to do, who do you want to be with?

INCOME
We will review your sources of income and plan on how to maximize your retirement trajectory.

INVESTMENTS
After we get to know you and your why, we can make a plan for how your investments need to support you during retirement.

TAX PLANNING
We will make a plan for tax implications during retirement and decide the most efficient way that seeks to maximize funds.

PROTECTION
The protection phase of The Stream Guide is to ensure your "why" is protected for all of life's "what if's". This includes considering options for estate planning, legacy planning, and life insurance planning.

ACTION
After implementation, we continually evaluate your needs over the years and, with your approval, make changes to pursue your Streamlined life.

We're glad you're here!

Streamlined Communication

- **Business Hours**
  - Monday-Friday 9am- 5pm MST (Streamlined Wealth Planning follows the Stock Market holiday closure schedule)
  - Meetings with your wealth advisor are by appointment only.

- **Communication Response Time**
  - Email-response within 24 hours
  - Texts & Voicemails-returned within 12 business office hours (Calls, texts, or emails received over the weekend will be returned on the following business day)

(970) 573-7111

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