The Transition Game Plan – The Facet Way



The Transition Conversation

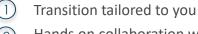
Experience and guidance every step of the way



Custom Transition Game Plan

Consistent, repeatable process designed around your workflow

- - Call scripts & guidelines
 - FAQs, objections & rebuttals framework
 - Team & 1-on-1 coaching 3



- (3)

- Hands on collaboration with Facet's team
- Flexible, iterative process



Client Transition Experience

Seamless, easy transition to **Facet Wealth**



- Seamless, high-touch transition
- Dedicated CFP[®] Professional
- (3)
- Facet Financial Life Plan evolves with client goals

Your Dedicated Team

Transition Specialists

Expertise in crafting a custom game plan for your firm





Brent Weiss, CFP[®], ChFC[®] Co-Founder & Head of Planning Harry Kirkpatrick, CFP® Head of Onboarding

Client Success Managers

Delivering an amazing transition experience for your clients





Andy Barton

Tara Floyd

Dedicated CFP® Professionals

Depth and experience to deliver excellent planning and service.





David Wirth, CFP®

Hali London. CFP®



facetwealth.com | 509 S. Exeter Street, Suite 202 Baltimore, MD 21202