

## *Due Dilligence Timetable*

*by XYZ Financial Services*

### **60 Day Process**

### **When**

#### *Step 1*

- The Presentation meeting
- Initial overview of the offering
  - The [ XYZ Financial Services ] Partnering System
  - Investment Philosophy

**Day 1**

#### *Step 2*

- The "If Appropriate" meeting
- Answer questions from meeting one
  - Decide to proceed, yes or no?

**Day 14**

#### *Step 3*

- The Due Diligence Process
- Examine staff credentials
  - Walk through office systems and processes
  - Establish key points of difference
  - Obtain testimonial contacts

**Day 21**

#### *Step 4*

- Phone testimonials
- Evaluate information gathered to date
- Decide to proceed, yes or no?

**Days 22 – 29**

#### *Step 5*

- The Half-day Technical Workshop
- Technical and strategic workshop for senior personnel

**Day 30**

#### *Step 6*

- Provide a trial case

**Day 31**

#### *Step 7*

- Obtain feedback from client once case concluded

**Day 60**

#### *Step 8*

- Decide to trial service for six months, yes or no?

**Day 60**

*Advise Better*  
*Live Better*