# The Onboarding Process

Once a client decides to hire Manske Wealth Management, we begin the onboarding process which typically takes four to eight weeks on average. During this time, our comunication is weekly until onboarding is complete. Once everything is completed, we ask clients to come in for an Initial Review. After the Initial Review, communication is monthly with at least one meeting per year to conduct a full top to bottom review of the portoflio. Below is what clients can expect to accomplish during the onboarding process.

**Weeks 1-2**

- Collect the various data, forms, and feedback we'd need to operationally begin our commitment.
- Open accounts at the respective custodians and begin the transfer process.
- Make sure accounts are being synced with our database.

**Weeks 3-4**

- Follow up on the transfer process and provide deposit information for appropriate accounts.
- Verify funds came over correctly and cost basis information is correct.

**Weeks 5-6**

- Make sure beneficiaries are set up correctly on all accounts and offer nicknaming services.
- If necessary, we'd assist with setting up automatic money transfers, checks, ATM cards, etc.
- Assist with using online access, the secure vault, and paper/electronic reporting.

**Weeks 7-8**

- Create a financial model to use as a baseline for future meetings/discussions.
- Set up the Initial Review to go over how to proceed investment-wise.

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