



# *Due Diligence Timetable*

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## **60 Day Process**

## **When**

### **Step 1**

#### ***The Presentation meeting***

- Initial overview of the offering
- The [ XYZ Financial Services ] Partnering System

*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
- Investment Philosophy

*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*