SmartHER
Coaching Widowed and Divorced Women Through Life's Financial Transitions

New Client Onboarding Process

Nice To Meet You!
Info Gathering

- 1 hour complimentary consultation with Jennifer
- Learn how our SmartHER team can help you
- Ask any questions on your mind
- Sign Financial Analysis Engagement Agreement to get started

Spending Plan
Meet with Talley or Stacey

- Talley or Stacey will gather banking & investment statements from you
- Discuss your current & future living expenses
- Complete your income & expense statement

Let's Touch Base
Meet with Jennifer

- Check-in meeting scheduled with you
- Bring any remaining documents
- Outline scenarios for our analysis
- Communicate with other professionals on your team

Analysis & Ongoing Support

- Analyze your scenarios
- Create short-term & long-term recommendations for your individual situation
- Communicate with other professionals on your team
- Provide ongoing support

Final Reviews
Let's Talk "New Normal"

- Meet Jennifer about your final recommendations
- Review financial related legal documents, as needed
- Design a "New Normal" spending plan, if needed
- Support you in getting resources and referrals where you need them