Wright Discovery Process

Discover How You Can Live Your Legacy

Coastal Tax Centers, LLC
2 East Bryan Street • Savannah, GA 31401
(912) 205-6992

Wright Discovery Process

Our Working Agreement

It is our pleasure to serve you. We are pleased to set forth our understanding with you. We ask that you work with us throughout the process so that we can respond to you in a timely fashion.

Phase I: **Vision - What You Want**
We will help you articulate and clearly define what you want to accomplish with your wealth by helping you; 1. Detail Your Wealth Priorities and 2. Outline Specific Financial Goals.

Phase II: **Assess - What You Have**
We will assess your current plan by providing; 1. Results Under Your Current Plan; 2. Create a Math Model of Your Assets; 3. Create a Retirement Needs Analysis; and 4. Outlining Critical Issues Identified During the Testing Process.

Phase III: Strategy - What You Need
We will design an integrated *Wealth Planning On Purpose Plan* what will assist you to satisfactorily achieve the results detailed on Phase I.

Phase IV: **Implementation**
We will develop a step-by-step Action Checklist, acquire any financial products and coordinate any legal tools necessary to fully realize the benefits of your newly designed *Wealth Planning On Purpose Plan*.

Consulting Fee for Phase I - II:

Consulting Fee Due Prior to Phase III - IV:

Your signature below indicates your acceptance of the terms outlined here and in the Addendum attached and your acknowledgment of receiving the Registered Investment Advisor ADV form Part II and Schedule t F at least 48 Hours prior to your signing this Letter of Engagement.

Sean ______________ Date ______ ______________ Date ______

(This Addendum is attached to and made past of the Engagement Agreement)

- SOLE AND FINAL AUTHORITY - You are free, at any time, to accept or reject any recommendation our firm proposes. You are the sole and final authority and have sole discretion regarding implementation of any recommendations.

- CONFIDENTIAL - All documents and information you furnish to us shall be treated as confidential.

- SEEK LEGAL/ACCOUNTING ADVICE - We are not accountants, actuaries, or attorneys and do not prepare any accounting, tax, or legal documents. You are responsible for obtaining your own accounting, tax and legal advice. Costs for these services are in addition to our fees.

- INFORMATION SOURCES - we obtain information on tax and estate planning matters, as well as financial and investment products, from a variety of publicly available sources. Recommendations are based upon professional judgment. There is no guarantee of the results of any recommendations. You are free to follow or not follow any recommendation provided by us.

- INSURANCE PRODUCTS - From time to time, your plan may require insurance products. In that event, Mr. Wright is licensed to acquire any needed products and will be compensated by the issuing companies; that will be no additional fee for that service.

- NO COMPENSATION ON CAPITAL GAINS - our fees for services will consist solely of the flat fee set forth in this agreement. We will not be compensated on the basis of a share of capital gains or capital appreciation of any investments.

- NO ASSIGNMENTS OF CONTACT WITHOUT CONSENT - No assignment of this contact may be made without your advance written consent.

- COMPLETE AGREEMENT - This represents our complete agreement and supersedes any prior understanding or agreements, oral or written.

- CANCELLATION - You may terminate this *Retainer Agreement* anytime before the end of each quarter. In addition, if you are not satisfied, you may receive a full refund of the retainer fee for that quarter.

initials ____________