New Client Intake Process

ALLODIUM PORTFOLIOS

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1	2	3	4	5	6	7
CONVERSATION WITH ALLODIUM ADVISOR	ADVISOR SENDS EMAIL LINK	INVESTOR CREATES NEW ACCOUNT	INVESTOR LINKS BANK ACCOUNT	INVESTOR ESTABLISHES GOALS	INVESTOR FUNDS ACCOUNT	INVESTOR ESTABLISHES AUTOMATIC DEPOSITS
You will share your preferences as we answer your questions about the Allodium Portfolios platform	You will receive an email with a link and instructions to open an Allodium Portfolios account	You set up your Allodium Portfolios account. Allodium will provide assistance with the process if needed.	You link your checking account with a two-step verification process to make transferring funds in and out of your investment accounts easy.	You establish investment goals based on your age, future financial needs and time horizon.	You fund your account from an outside investment or bank account.	You have the option to set up and make monthly deposits into your Allodium Portfolios account.