

Otium Advisory Group

Project - Progress Report

Date:

Client:

CONFIDENTIAL

EGADIM

Advisor

Client

(E)stablish, (G)ather, (A)nalyze

Complete Discovery Form (Optional)

Sign CLIENT/ADVISOR AGREEMENT

Client pays initial invoice through ADVICEPAY

Permission granted to access private DROPBOX folder

Permission granted to access RIGHTCAPITAL account

Client logs into Rightcapital and enters financial information

Client uploads requested documents into assigned DROPBOX folder

Advisor begins the evaluation of initial data set (24 hours)

Advisor requests clarification of initial data set

(D)evelop

Advisor completes analysis, development of solutions (72 hours)

Advisor delivers written plan + upload into DROPBOX folder (24 hours)

Advisor schedules "Solutions Presentation" Meeting

(I)mplement

Client reviews and completes tasks

Advisor invites other professionals to help complete tasks (if applicable)

Advisor checks status of assigned tasks

(M)onitor

Semi Annual Meeting

Annual Meeting
