

COACHING PROGRAM AGENDA

TRAINING PHASE

TRAINING CALL 1

Portfolio Design Training

Coach Dan Kullman

- Market agnostic behavioral portfolio design training for accumulation and distribution
- Portfolio design compartmentalization

TRAINING CALL 2

Portfolio Design Implementation

Coach Dan Kullman

- Analysis review (when applicable): equity scenario, equity strategy market cycle- periodic table, correlation and fixed income interest rate sensitivity
- Portfolio component behavioral assignment
- Reassemble portfolio components for accumulation and distribution portfolios

TRAINING CALL 3

Behavioral Guidance Tools Training I

Coach Eben Burr

- Review behavioral portfolio design brochure – your guide to whole portfolio construction
- Frame the risk landscape

- Discuss performance without discussing numbers
- Framework for investment decision making

TRAINING CALL 4

Behavioral Guidance Tools Training II

Coach Eben Burr

- Build structure for investors attempting to overcome behavioral challenges
- Emphasize investor pre-commitments
- Ongoing portfolio construct reinforcement
- Reinforcing pre-commitments

TRAINING CALL 5

Goals Based Planning Training

Coach Eben Burr

- Refocus client from benchmark centrality to financing of future goals
- Stress testing* using outlier events

TRAINING CALL 6

Client Engagement Cycle Construction

Coach Eben Burr and Dan Kullman

- Client engagement cycle - onboarding
- Implementation process for clientele

COACHING PHASE

MONTHLY CALL 1 & 2

Coach Dan Kullman

MONTHLY CALL 3 - 7

Coach Eben Burr

MONTHLY CALL 8 – 10

Coach Dan Kullman

Review progress

- Assess use of behavioral guidance tools
- Problem solve challenges and chart the goals for the following month.
- Discuss techniques for emergent client issues
- Revisit and build on concepts from training calls

*Stress Testing as described above consists of a Monte Carlo simulation rather than testing for liquidity of funds