MFS ProActive Review

A thorough assessment of each client's plan, adhering to fiduciary standards in the capacity of the advisory role and leveraging the team's expertise

MAVERICK
FINANCIAL STRATEGIES

ProActive Review Objectives:

Process: We follow a systematic process incorporating fiduciary standards
ProActive: Our ProActive Review process promotes regular oversight, monitoring, and updates from our team

- Team: Your Maverick Financial Strategies Service Team collaborates to provide comprehensive insights and oversight of your plan

ProActive Review Process:

Once we have implemented a plan and established accounts, our ongoing engagement requires monitoring. Our systematic approach involves a comprehensive review of your profile by your dedicated service team periodically throughout the year. We've implemented rigorous standards to help promote that no details are overlooked. You will be kept in the loop throughout this process, and we remain at your service for any unforeseen circumstances that may arise – we understand that such occurrences are inevitable aspects of life.

Investment Checklist

- Economic indicator update x12
- Risk tolerance vs allocation review
- Performance vs benchmark review
- Tactical, strategic and diversifier - 3 mandated reviews
- Distribution phase review
- Annuity/lifetime income review
- Optimizer or Self-Directed Brokerage availability
- Fee reduction availability
- Beneficiary verification

"What If" Checklist

- Life insurance needs review
- Premium reduction availability
- Disability needs review
- Nursing care review
- Beneficiary verification

Administrative Checklist

- Annual meeting mandate
- Driver license update
- Required Minimum Distributions (RMDs)
- Outstanding task/workflow review
- Email address update
- Banking info update
- Online access review
- Profile update
- Service Team update

Financial Plan Checklist

- Retirement cash flow projection review
- Monte Carlo stress test
- Education funding review
- Other goal review
- Social Security income analysis
- Estate plan update
- Life changes inquiry

Timing of the ProActive Review varies based on service model

MFS believes the ProActive Review is critical to a client's success, always putting the interests of our client’s first.
RR’s and IARs are representative of Cambridge Investment Research as a BD and RIA respectivley.