

# 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:

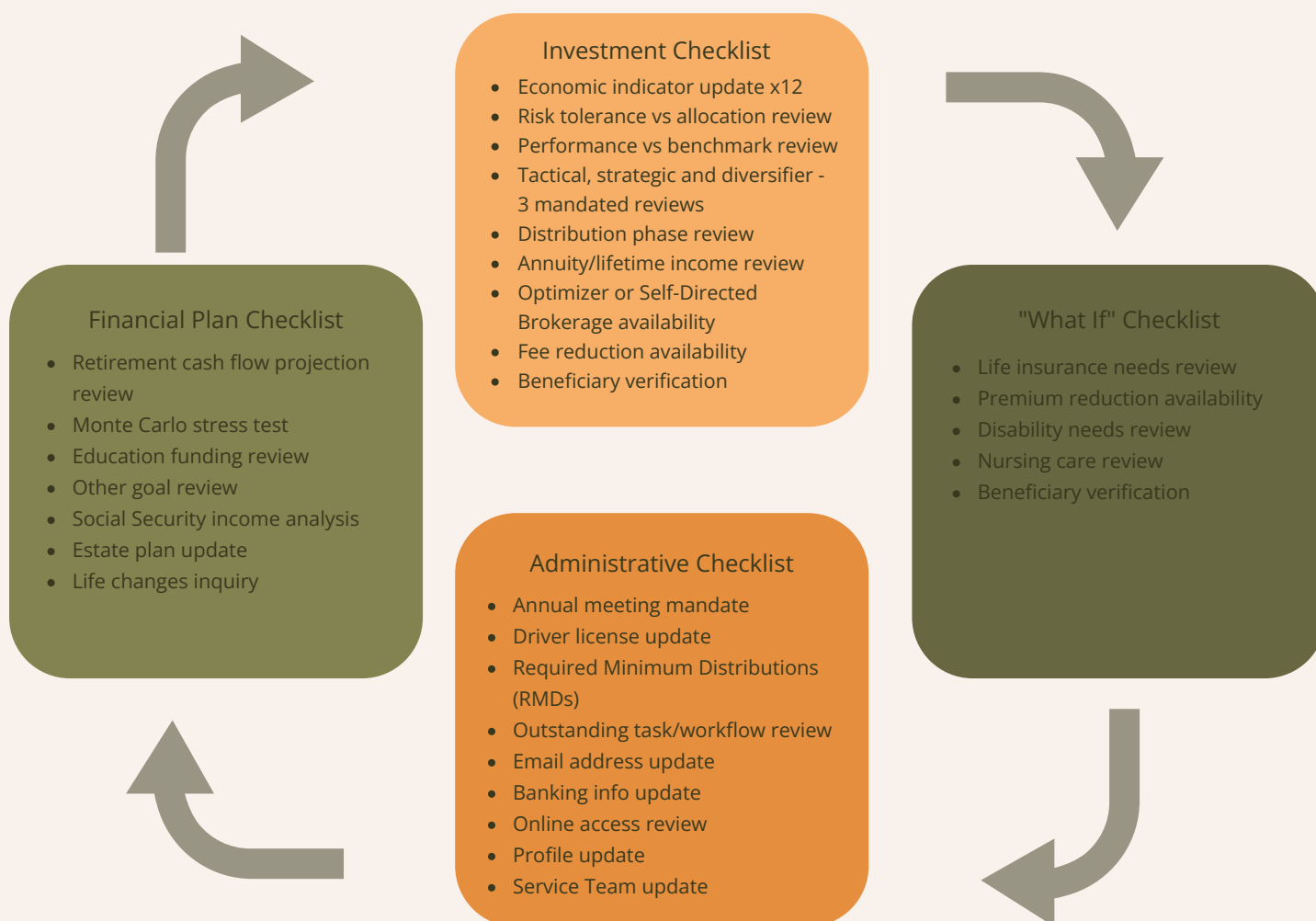
Process: We follow a systematic process incorporating fiduciary standards

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.



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 respectively.

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