Onboarding Timeline

Client Agreement Signed

Welcome to Leverty Financial Group! Your financial journey begins now, and we're here to support you every step of the way.

Accounts Opened

We're pleased to announce that all of your accounts have been successfully opened for you. Your financial future is taking shape!

Rollover Call

If needed we may schedule time for a rollover call. This will help streamline your assets to LFG and make the transition seamless.

Account Transfers

Our team is working diligently to facilitate the transfer of your accounts. Expect regular updates and prompt communication if we need anything from you during this process.

Funds Transfer Complete

Once your funds transfer is complete, you'll receive a call or email from us to schedule a meeting with your advisor.

Meet with Advisor

During this meeting, we'll go over the next steps of your financial plan, ensuring it aligns with your unique goals and aspirations.

LF