## THE ONBOARDING PROCESS

## Service Provider Plan Design Propose Gather Plan Review investment Review plan Information financing menu information. Review/Execute positions enhancements • Prepare due enhancements Contract diligence • Prepare Audit Investment and any service Meet with client presentation and EBA (if mapping and issues with to understand transition applicable) Implement vendors key plan goals/ design Investment Financing Review vendor objectives changes Policy Policy fees and Statement Statement • Set up plan negotiation discussion discussion on internal options (if systems applicable) Kickoff Financing Strategy Investment Review

