PATHWISE GROUP

FOR EMPLOYEES

HOW TO BOOK

Book your complimentary conversation in under a minute

1. **Scan the QR code or visit the booking page**
   calendly.com/pathwise-concierge-team, the Pathwise concierge team's calendar.
2. **Pick a time that works for you**
   Choose a slot for a 45-minute conversation by video or phone.
3. **Get your confirmation**
   You'll receive a confirmation and a reminder before your meeting.
4. **Take the assessment if you haven't yet**
   It helps your advisor focus on what matters most to you.
5. **Meet, and leave with a next step**
   Bring your questions. No cost, no obligation.

Book with the concierge team

Need help booking?

Email info@pathwisegroup.com and we'll help you find a time.

Book my conversation