CHOOSE THE BEST ROUTE FOR THE ADVICE THAT YOU SEEK FOR YOUR FINANCIAL PLANNING

Foundations
$175/month

Master the key elements of personal finance

WHAT DO I GET?

- 30 minute Discovery call
- 60 minute coaching meeting
- Online dashboard to track progress and organize financial accounts
- Annual progress/planning meeting

WHAT DO WE COVER?

- Creating a budget
- Building an emergency fund
- Debt management and credit consulting
- Protection of assets with the right insurance planning

Family CFO
$250/month*

Comprehensive financial planning focused on helping you achieve your goals.

WHAT DO I GET?

- 2 virtual or in person meetings per year to review progress and update your plan
- A delivered financial plan with outlined action steps
- Online dashboard to track progress, organize all of your financial life in one place.
- Year-round access to a financial advisor

WHAT DO WE COVER?

EVERYTHING OFFERED IN FOUNDATIONS, PLUS:

- Employee benefit/401(k) review
- Net worth tracking
- Investment planning
- Behavioral finance coaching
- Retirement Accumulation Planning
- Retirement distribution planning
- Major purchase planning
- Major life event planning
- College Planning
- Estate Planning
- Collaboration with CPA --Income tax consulting
- Collaboration with Attorney(s) –Will & Trust set up

*Fee waived with more than $500K of assets under management

ANSWERS AS-NEEDED
$350/session*

Great for a quick answer to your big questions, get a second opinion, or an annual checkup!

WHAT DO I GET?

- 30 minute discovery call
- 60 minute consultation

WHAT DO WE COVER?

- Financial problem or problems YOU are trying to solve!

COMMON PLANNING AREAS:

- 401(k) Asset Allocation
- Retirement Accumulation Analysis
- Retirement Distribution Analysis
- College Education Funding Analysis
- Employee benefit analysis and selection
- Retirement pension distribution analysis
- Understanding your investments
- Life insurance planning
- Disability insurance planning
- Long-term care planning
- Selecting the proper social security claiming strategy

*Subject to change based on complexity

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