

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

<b>Foundations</b> \$175/month	<b>Family CFO</b> \$250/month*	<b>ANSWERS AS-NEEDED</b> \$350/session*
<b>Master the key elements of personal finance</b>	<b>Comprehensive financial planning focused on helping you achieve your goals.</b>	<b>Great for a quick answer to your big questions, get a second opinion, or an annual checkup!</b>
<b>WHAT DO I GET?</b>	<b>WHAT DO I GET?</b>	<b>WHAT DO I GET?</b>
<ul style="list-style-type: none"> <li>· 30 minute Discovery call</li> </ul>	<ul style="list-style-type: none"> <li>· 2 virtual or in person meetings per year to review progress and update your plan</li> </ul>	<ul style="list-style-type: none"> <li>· 30 minute discovery call</li> </ul>
<ul style="list-style-type: none"> <li>· 60 minute coaching meeting</li> </ul>	<ul style="list-style-type: none"> <li>· A delivered financial plan with outlined action steps</li> </ul>	<ul style="list-style-type: none"> <li>· 60 minute consultation</li> </ul>
<ul style="list-style-type: none"> <li>· Online dashboard to track progress and organize financial accounts</li> </ul>	<ul style="list-style-type: none"> <li>· Online dashboard to track progress, organize all of your financial life in one place.</li> </ul>	
<ul style="list-style-type: none"> <li>· Annual progress/planning meeting</li> </ul>	<ul style="list-style-type: none"> <li>· Year-round access to a financial advisor</li> </ul>	
<b>WHAT DO WE COVER?</b>	<b>WHAT DO WE COVER?</b>	<b>WHAT DO WE COVER?</b>
<ul style="list-style-type: none"> <li>· Creating a budget</li> </ul>	<b>EVERYTHING OFFERED IN FOUNDATIONS, PLUS:</b>	<b>COMMON PLANNING AREAS:</b>
<ul style="list-style-type: none"> <li>· Building an emergency fund</li> </ul>	<ul style="list-style-type: none"> <li>· Employee benefit/401(k) review</li> </ul>	<ul style="list-style-type: none"> <li>· 401(k) Asset Allocation</li> </ul>
<ul style="list-style-type: none"> <li>· Debt management and credit consulting</li> </ul>	<ul style="list-style-type: none"> <li>· Net worth tracking</li> </ul>	<ul style="list-style-type: none"> <li>· Retirement Accumulation Analysis</li> </ul>
<ul style="list-style-type: none"> <li>· Protection of assets with the right insurance planning</li> </ul>	<ul style="list-style-type: none"> <li>· Investment planning</li> </ul>	<ul style="list-style-type: none"> <li>· Retirement Distribution Analysis</li> </ul>
	<ul style="list-style-type: none"> <li>· Behavioral finance coaching</li> </ul>	<ul style="list-style-type: none"> <li>· College Education Funding Analysis</li> </ul>
	<ul style="list-style-type: none"> <li>· Retirement Accumulation Planning</li> </ul>	<ul style="list-style-type: none"> <li>· Employee benefit analysis and selection</li> </ul>
	<ul style="list-style-type: none"> <li>· Retirement distribution planning</li> </ul>	<ul style="list-style-type: none"> <li>· Retirement pension distribution analysis</li> </ul>
	<ul style="list-style-type: none"> <li>· Major purchase planning</li> </ul>	<ul style="list-style-type: none"> <li>· Understanding your investments</li> </ul>
	<ul style="list-style-type: none"> <li>· Major life event planning</li> </ul>	<ul style="list-style-type: none"> <li>· Life insurance planning</li> </ul>
	<ul style="list-style-type: none"> <li>· College Planning</li> </ul>	<ul style="list-style-type: none"> <li>· Disability insurance planning</li> </ul>
	<ul style="list-style-type: none"> <li>· Estate Planning</li> </ul>	<ul style="list-style-type: none"> <li>· Long-term care planning</li> </ul>
	<ul style="list-style-type: none"> <li>· Collaboration with CPA --Income tax consulting</li> </ul>	<ul style="list-style-type: none"> <li>· Selecting the proper social security claiming strategy</li> </ul>
	<ul style="list-style-type: none"> <li>· Collaboration with Attorney(s) --Will &amp; Trust set up</li> </ul>	

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