FINALLY!

FINANCIAL PLANNING

YOU CAN TRUST

RETIREMENT IS THE BIGGEST FINANCIAL DECISION YOU MAKE

When you focus on what matters to you, you see results

BUILD WEALTH • REDUCE TAXES • OPTIMIZE INCOME

- ✓ FIDUCIARY
- ✓ TRANSPARENT PRICING
- ✓ EXPERIENCED PROFESSIONALS
- ✓ INDEPENDENT AND UNAFFILIATED FROM A BROKER-DEALER
- ✓ PLANNING & ADVICE FOCUSED, NOT SELLING FOCUSED

SERVICES & FEES

COMPREHENSIVE FINANCIAL PLAN *Detailed Retirement Planning*	899.00
BASIC FINANCIAL PLAN *Foundational Financial Planning & High-level Retirement Planning*	289.00
HOURLY FINANCIAL PLANNING *Per (2) hour meeting. Focused on what's important to you!*	150.00
A LA CARTE or PROJECT BASED *Fees will vary depending on service*	

*ADDITIONAL SERVICES & DETAILS ON NET PAGE

ALL OF OUR SERVICES START WITH A COMPLIMENTARY CONSULT

We want to make sure we are a good fit for you and you're a good fit for us.

SCHEDULE YOURS TODAY

WHY US?

When you work with us, you have an immediate comprehensive, powerful team of pros behind you. You normally only meet with your Financial Advisor, but the entire team is working for you behind the scenes.

- Financial Advisor
- Tax pro (CPA)
- Real Estate pro
- Estate Planner

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FINANCIAL PLANNING

FEES	ONGOING COMPREHENSIVE FINANCIAL PLANNING	BASIC FINANCIAL PLAN	INVESTMENT MANAGEMENT (ONLY)	DEBT ELIMINATION PLAN
	$899/yr	$289/yr	$99	$149
INITIAL MEETINGS	●	●	●	●
BUDGET & CASHFLOW	●	●	●	●
DEBT & STUDENT LOAN ASSESSMENT	●	●	---	●
INVESTMENT ADVICE	●	●	●	---
INVESTMENT MANAGEMENT	●	●	●	---
***ADDITIONAL MANAGEMENT FEES				
CLIENT PORTAL	●	●	●	●
UNLIMITED E-MAIL/TEXT/CALL	●	●	●	●
QTLY or ANN CHECKPOINTS	●	---	●	●
GOAL CLARITY & PRIORITIZATION	●	●	●	●
PRIORITIZE CONCERNS	●	●	●	●
HIGH-LEVEL RETIREMENT PLANNING	---	●	---	---
HIGH-LEVEL LEGACY/EDUCATION PLANNING	---	●	---	---
LIFE INSURANCE NEEDS ANALYSIS	●	●	---	---
ESTATE PLANNING ANALYSIS (WILL/TRUST)	●	●	---	---
DETAILED RETIREMENT PLANNING	●			
DETAILED LEGACY/EDUCATION PLANNING	●			
LIFE INSURANCE NEEDS ANALYSIS	●			
PROACTIVE TAX ANALYSIS	●			
MILITARY BENEFITS & PENSION PLANNING	●			
EMPLOYEE BENEFITS ANALYSIS	●			
MARRIAGE PLANNING	●			
DIVORCE PLANNING	●			
AGING PARENT CARE PLANNING	●			
INHERITANCE PLANNING	●			
WIDOWER/WIDOW PLANNING	●			
MORTGAGES ANALYSIS	●			

HOURLY FINANCIAL PLANNING 150.00

Per (2) hour meeting. Focused on what's important to you!

INDIVIDUAL TAX PREPARATION 350.00

Fees start @ $350 per return & increase based on complexity

LIFE INSURANCE ONLY

Perfect for those that are interested in focusing on their life insurance needs. Rates depend on the type of insurance, age, sex, health, and other lifestyle factors.

ESTATE PLANNING ONLY

Guardianship	149.00
Will & Last Testament, HIPPA Auth	449.00
Full Trust	1,199.00

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ESTATE PLANNING

GUARDIANSHIP

FOR PARENTS WITH MINOR CHILDREN WHO AREN'T READY TO CREATE A WILL

WILL

GREAT FOR SINGLE INDIVIDUALS OR MARRIED COUPLES. A WRITTEN PLAN FOR WHAT SHOULD HAPPEN TO YOUR ASSETS & WHO WILL LOOK AFTER YOUR CHILDREN, IF SOMETHING HAPPENS TO YOU OR YOUR SPOUSE

TRUST

AVOID PROBATE WITH ALL THE DOCUMENTS NEEDED TO PROTECT AND TRANSFER THE THINGS THAT MATTER MOST TO YOU

	GUARDIANSHIP	WILL	TRUST
FEES	$149	$449	$1,199
DOCUMENTS			
NOMINATION OF GUARDIAN	●	●	●
LAST WILL & TESTAMENT		●	●
HIPAA AUTHORIZATION		●	●
LIVING WILL		●	●
POWER OF ATTORNEY		●	●
TRUST			●
CERTIFICATE OF TRUST			●
SCHEDULE & TRANSFER OF ASSETS			●
POUR OVER WILL			●
MEDICAL POWER OF ATTORNEY			●
ADVANCE HEALTH CARE DIRECTIVE			●
DEED(S) FOR REAL PROPERTY			*ADDITIONAL $250
BENEFITS			
STATE SPECIFIC	●	●	●
NOMINATE GUARDIANS FOR CHILDREN	●	●	●
SPECIFY HEALTHCARE WISHES		●	●
NOMINATE GUARDIANS FOR PETS		●	●
DETERMINE FINAL ARRANGEMENTS		●	●
LEAVE SPECIFIC GIFTS		●	●
NOTE SPECIAL REQUESTS		●	●
AVOID PROBATE COURT			●
TRANSFER ASSETS INTO TRUST			●
ASSETS GO DIRECTLY TO BENEFICIARIES			●

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