A Plan for Every Stage

Which Best Describes You?

	Single, Starting a Family, or a Growing Family	Near or Entering Retirement	Settled Into Retirement
WHAT IT COSTS One Time Fee	$1,800	$2,300	$1,200
WHAT IS INCLUDED			
GUIDANCE			
Goal Setting	✓	✓	✓
Goal Tracking	✓	✓	✓
Budget Creation	✓	✓	
Estate Document Coordination	✓	✓	✓
Financial Organization System Binder or Virtual	✓	✓	✓
6 Month Check-Up	✓	✓	✓
12 Month Check-Up	✓	✓	✓
ANALYSIS			
Emergency Savings	✓	✓	✓
Employee Benefits	✓	✓	
Loans/Debts	✓	✓	
Retirement Savings	✓	✓	✓
Social Security Strategy		✓	
Insurance	✓	✓	
Investment	✓	✓	✓

Don't need a full comprehensive plan? Topic specific help is $275/hour.

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Progress Throughout Life

What it Costs

Assets Under Advisement Annual Fee Schedule	
Up to $2,000,000	1.00%
$2,000,001 - $5,000,000	0.90%
$5,000,001+	0.85%

What is Included	Up to $500,000	$500,001-$1,000,000	$1,000,001 +
Organization			
Your Personal Financial Website	✓	✓	✓
Goal Setting & Plan Update In Person or Virtual	Every 3 Years	Every 2 Years	Every Year
Ongoing Accountability Partner	✓	✓	✓
Beneficiary Management		✓	✓
CPA & Estate Attorney Coordination		✓	✓
Management			
Cash Flow Guidance	✓	✓	✓
Investment Management	✓	✓	✓
Performance Monitoring	✓	✓	✓
Goal Tracking	✓	✓	✓
Insurance Management	✓	✓	✓
Investment Review In Person or Virtual	Annual	Annual	Annual Separate from Goal Setting & Plan Update Meeting

See account agreements for more information. Fee schedule is as of 1/30/2019 and subject to change.

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