



FINANCIAL PLANNING MENU

Financial planning is much more than investment advice. It's life advice. We can combine money management with strategic financial planning to help you accomplish your goals and live the life you dream of.

SERVICE BENEFIT TIERS	SILVER	GOLD
Initial Financial Planning Fee	\$800	\$1200
Service Fee Options		
Option 1 - Monthly Subscription Fee	\$100	\$140
Option 2 - Assets Under Management Fee	\$150,000 or less 1.25% \$151,000 or greater 1.0%	
Services Included		
Meetings offered per year (via phone, person, or video conference)	2	3
Account Establishment (IRA, Roth IRA, Simple IRA, Individual, Joint, Trust, TOD, Bene IRA, Charitable, 401K, LLC Partnerships)	✓	✓
Investment Asset Allocations Guidance - Basic	✓	✓
Corporate Plan Rollovers	✓	✓
Account Consolidation	✓	✓
Net Worth Analysis	✓	✓
Transactional Services (contributions & distributions)	✓	✓
Online Account Access	✓	✓
Corporate Retirement Plan Review	✓	✓
Retirement Planning - Basic	✓	✓
Liability Planning - Basic	✓	✓
Liability Planning - Comprehensive	✓	✓
Cash Flow Analysis	✓	✓
Retirement Distribution Planning	✓	✓
Retirement Planning - Comprehensive	✓	✓
Investment Allocation - Comprehensive	✓	✓
College Planning/Student Loan Debt		✓
Insurance Review		✓
Tax Planning (includes consultation wit your CPA)		✓
Estate & Gift Planning		✓
Business Planning		TBD
Debt/Liability Plan	✓	✓
Health Care Cost Analysis		✓
Social Security Planning	✓	✓
Medicare Planning		✓
Educational Services		
Weekly News Topics	✓	✓
Monthly Financial Webinar	✓	✓
Quarterly Economic Conference Call		✓