

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.



	GOLD	SILVER	SERVICE BENEFIT TIERS	
Option 1 - Monthly Subscription Fee Option 2 - Assets Under Management Fee S150,000 or is S150	\$1200	\$800	Initial Financial Planning Fee	
Option 2 - Assets Under Management Fee \$\frac{\f	Service Fee Options			
Services Included Meetings offered per year (via phone, person, or video conference) 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 - 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 Debt/Liability Plan Health Care Cost Analysis Social Security Planning	\$140	\$100	Option 1 - Monthly Subscription Fee	
Meetings offered per year (via phone, person, or video conference) 2 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 Petirement Planning - Comprehensive Investment Allocation - Comprehensive √ College Planning/Student Loan Debt Insurance Review Tax Planning (includes consultation wit your CPA) Estate & Gift Planning Business Planning Debt/Liability Plan ✓ Health Care Cost Analysis	\$150,000 or less 1.25% \$151,000 or greater 1.0%		Option 2 - Assets Under Management Fee	
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 Planning - Comprehensive Investment Allocation - Comprehensive College Planning/Student Loan Debt Insurance Review Tax Planning (includes consultation wit your CPA) Estate & Gift Planning Business Planning Debt/Liability Plan Health Care Cost Analysis	Services Included			
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 Planning - Comprehensive Investment Allocation - Comprehensive College Planning/Student Loan Debt Insurance Review Tax Planning Business Planning Business Planning Debt/Liability Plan Health Care Cost Analysis Social Security Planning	3	2	Meetings offered per year (via phone, person, or video conference)	
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 V Liability Planning - Comprehensive Cash Flow Analysis Retirement Distribution Planning Retirement Planning - Comprehensive V Investment Allocation - Comprehensive V College Planning/Student Loan Debt Insurance Review Tax Planning Business Planning Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓	✓		
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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 Business Planning Debt/Liability Plan Health Care Cost Analysis Social Security Planning V	✓	✓	Corporate Plan Rollovers	
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 Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓	✓	Account Consolidation	
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 Debt/Liability Plan Health Care Cost Analysis Social Security Planning	√	✓	Net Worth Analysis	
Corporate Retirement Plan Review Retirement Planning - Basic Liability Planning - Basic V Liability Planning - Comprehensive Cash Flow Analysis Retirement Distribution Planning Retirement Planning - Comprehensive Investment Allocation - Comprehensive V College Planning/Student Loan Debt Insurance Review Tax Planning (includes consultation wit your CPA) Estate & Gift Planning Business Planning Debt/Liability Plan V Health Care Cost Analysis Social Security Planning	✓	✓	Transactional Services (contributions & distributions)	
Retirement Planning - Basic Liability Planning - Basic 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 Debt/Liability Plan I Health Care Cost Analysis Social Security Planning	√	✓	Online Account Access	
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 Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓	✓	Corporate Retirement Plan Review	
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 Debt/Liability Plan Health Care Cost Analysis Social Security Planning	√	✓	Retirement Planning - Basic	
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 Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓	✓	Liability Planning - Basic	
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 Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓	✓	Liability Planning - Comprehensive	
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 Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓	✓	Cash Flow Analysis	
Investment Allocation - Comprehensive College Planning/Student Loan Debt Insurance Review Tax Planning (includes consultation wit your CPA) Estate & Gift Planning Business Planning Debt/Liability Plan Health Care Cost Analysis Social Security Planning	√	✓	Retirement Distribution Planning	
College Planning/Student Loan Debt Insurance Review Tax Planning (includes consultation wit your CPA) Estate & Gift Planning Business Planning Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓	✓	Retirement Planning - Comprehensive	
Insurance Review Tax Planning (includes consultation wit your CPA) Estate & Gift Planning Business Planning Debt/Liability Plan Health Care Cost Analysis Social Security Planning	√	✓	Investment Allocation - Comprehensive	
Tax Planning (includes consultation wit your CPA) Estate & Gift Planning Business Planning Debt/Liability Plan ✓ Health Care Cost Analysis Social Security Planning ✓	√		College Planning/Student Loan Debt	
Estate & Gift Planning Business Planning Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓		Insurance Review	
Business Planning Debt/Liability Plan Health Care Cost Analysis Social Security Planning	✓		Tax Planning (includes consultation wit your CPA)	
Debt/Liability Plan Health Care Cost Analysis Social Security Planning ✓	√		Estate & Gift Planning	
Health Care Cost Analysis Social Security Planning ✓	TBD		Business Planning	
Social Security Planning	√	✓	Debt/Liability Plan	
	✓		Health Care Cost Analysis	
Medicare Planning	✓	✓	Social Security Planning	
	✓		Medicare Planning	
Educational Services			Educational Services	
Weekly News Topics ✓	✓	✓	Weekly News Topics	
Monthly Financial Webinar ✓	✓	✓	Monthly Financial Webinar	
Quarterly Economic Conference Call	✓		Quarterly Economic Conference Call	