

Financial Planning Menu



	ONGOING PLANNING SERVICES		COMPREHENSIVE PLANNING SERVICES		
	Foundational Planning \$2,100	Silver \$2,800+	Gold \$3,200+	Platinum \$3,900 +	Diamond \$8,000 +
Ideal for:	Those who want to organize their financial life	Those who want to develop and achieve near term as well as long term financial goals	Those with significant financial planning goals as well as more advanced Financial planning needs	Financial Planning geared towards business owners and high net-worth individuals	Comprehensive planning for those with significant financial needs and concerns
Personal Financial View Platform created and maintained	✓	✓	✓	✓	✓
Recommendations for customized portfolios for all investment accounts	✓	✓	✓	✓	✓
In-house investment management and rebalancing for portfolios (Asset Management fees apply)	✓	✓	✓	✓	✓
Phone calls and emails on an as-needed basis	✓	✓	✓	✓	✓
Financial Planning Meetings	2	3	4	6	8
Annual Meeting		✓	✓	✓	✓
Quarterly reviews and updates to your plan		✓	✓	✓	✓
Additional “quarterbacking” engagements with other professionals (attorney, CPA, insurance, employer)			✓	✓	✓
Annual on-site visit with you and your business associates or family members				✓	✓
Outsourced family CFO • Monthly Cash Flow Analysis • Expense Review Analysis					✓

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