

1-TIME FINANCIAL PLAN

- 5-Month Project-Based Engagement
- Includes 5 One-Hour Sessions Over 5 Months & Unlimited Text/Email/Phone Support During Engagement
- Address 2-3 Planning Areas Per Month
- **End Result:** Comprehensive List of Recommendations to Implement & Ongoing Access to RightCapital (Financial Planning Software)
- **Cost: \$4,800 (\$960 Per Month for 5 Months | Paid in Advance)**



1-Time Financial Plan Roadmap

Meeting 1

- Document Upload & Account Linking
- Roadmap of Planning Priorities
- Cash-Flow & Budget Reconciliation

Meeting 2

- Core-Values Interactive Exercise
- Statement of Financial Purpose Creation
- Retirement or Employer Benefits
- Equity-Compensation Strategy
- Debt and/or Student Loan Strategy

Meeting 3

- Savings Plan Strategy
- Charitable Giving Strategy
- Tax Projection & Tax Strategy

Meeting 4

- Kid's Education Funding Analysis
- Estate Plan Review
- Insurance Review (Life, Disability, Home/Auto, LTC)
- Real Estate Analysis

Meeting 5

- Investment Allocation & Rebalancing Recommendations
- Retirement Projection
- "What's Possible"