

1-Time Financial Plan Roadmap

Meeting 1

- 5-Core Values Assessment
- Statement of Financial Purpose Creation
- Roadmap of Planning Priorities

Meeting 2

- Cash-Flow
- Retirement or Employer Benefits
- Equity-Compensation Strategy
- Student Loan Strategy

Meeting 3

- Tax Strategy
- Charitable Giving

Meeting 4

- Investment Allocation Recommendations & Rebalancing
- Other – Kids Funding, Estate Planning, Insurance, Real Estate Analysis, Behavioral Finance

Meeting 5

- Retirement Projection
- “What’s Possible”

1-TIME FINANCIAL PLAN

- 4-Month Intensive Engagement
- Includes 5, One-Hour Sessions Over 4 Months
- Address 1-2 Planning Areas Per Monthly Session
- 3-5 Hours of “Homework” Each Month
- **End Result:** 1-Time Comprehensive Financial Plan & Ongoing Self-Login to RightCapital (Financial Planning Software)
- **Cost: \$5,000 (50% Paid Up-Front, 50% Paid Upon Completion)**
- *Requires: Discipline, Ability to Execute Planning Priorities & Self-Manage Ongoing*

