

1-TIME FINANCIAL PLAN

- 4-Month Project-Based Engagement
- Includes Monthly One-Hour Sessions Over 4 Months & Unlimited Text/Email/Phone Support During 4-Month Engagement
- Address 2-3 Planning Areas Per Month
- **End Result:** Comprehensive List of Recommendations to Implement & Ongoing Access to RightCapital (Financial Planning Software)
- **Cost: \$4,000 (\$1,000 Per Month for 4 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

- 5-Core Values Assessment
- Statement of Financial Purpose Creation
- Retirement or Employer Benefits
- Equity-Compensation Strategy
- Student Loan Strategy

Meeting 3

- Tax Strategy
- Charitable Giving Strategy
- Education Funding Analysis
- Estate Plan Review
- Insurance Review
- Real Estate Analysis

Meeting 4

- Investment Allocation Recommendations & Rebalancing
- Retirement Projection
- “What’s Possible”