WEALTH MANAGEMENT SERVICES

Financial Planning & Consulting Packages

Introductory Planning Conversation	Advanced Planning Package	Premier Planning Package
Ideal For: Individuals and Families looking to dive into Basic Goal Based Planning- “Super Savers”	Ideal For: Individuals or Families looking to organize their financials, plan for the future, and set and monitor financial goals- "Asset Accumulators"	Ideal For: Individuals, families, and/or business owners with complex financial needs- “Distribu-tion & Legacy”
Meeting: One 45-minute Zoom meeting	**Meeting: Three 60-minute Zoom meetings**	**Meetings: Four 60-minute Zoom Meetings**
Service Hours: 4+	**Service Hours: 16+**	**Service Hours: 27+**
Take the first step toward Financial Planning by uploading your data into our Basic Goal Based Planning Tool; followed by a Zoom meeting where you will receive personalized one-on-one solutions-based consulting and coaching with our experienced, in-house Wealth Planner and 401(k) Specialist.	Advance your Financial Strategy with our Robust Goal-Based Planning Tool, guided with personal service through the entire process. Whether you are ready to invest in your first full Financial Plan, or you are looking to brush up your previous Plan, we are glad to be of service! Experience our 3-Meeting approach where we walk you through the steps needed to organize, plan, and monitor your financial goals to achieve your biggest dreams. Each meeting will be completely personalized, directly lead by our experienced, in-house Wealth Planner and 401(k) Specialist.	Elevate your Financial Vision to the highest level with our Premier Financial Planning solution. You will receive Comprehensive Guidance and completely Customized Solutions in a tailored 4-meeting process. You will gain Exclusive Access to our Advanced Strategies and Insights in a Personalized Consultation approach led by one or more of our esteemed in-house Wealth Planners, Business Retirement Plan Specialists, and 401(k) Specialists, while collaborating seamlessly with your chosen Tax Advisor, Estate Planning Advisor, and/or Other Trusted Council for the most comprehensive, fully integrated Financial Plan.
$550	**$3,600**	**$8,900**

Hourly Planning & Consulting

We are pleased to offer ala carte planning services starting at $250/hour depending on your situation and needs. Hours will be estimated and proposed on a project-by-project basis.

Common hourly planning & consulting services often include One-Time or Life Events, such as:

Portfolio Review, Insurance Review, Financial Plan Maintenance Review, 401(k) Allocation Discussion, Birth of a Child, Death, Divorce, Changing Jobs, Starting/Closing a Business, Buying/Selling a Business, Buying/Selling a House, Relocating, New Employer Benefits offer (ESOP, NQDC, Stock Options, Vesting) decisions.

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FINANCIAL PLANNING & CONSULTING MENU OF SERVICES

		Introductory	Advanced	Premier
Service Standards	Number of Meetings	1	3	4
	Access to Professional Financial Advice	X	X	X
	Online Financial Goal Tracker	X	X	X
	Secure Document Upload	X	X	X
	Budgeting Tools		X	X
	Financial Education Communication	X	X	X
	Monthly Market Updates & Insights	X	X	X
Client Benefits	Investment Allocation Advice	X	X	X
	Portfolio Analysis	X	X	X
	Financial Goal Plan Check-ups	X	X	X
	Risk Tolerance Assessment	X	X	X
	Retirement Saving Planning	X	X	X
	Employee Benefit Review	X	X	X
	Behavioral Financial Coaching	X	X	X
	Life Insurance Analysis		X	X
	Online Financial Organizer		X	X
	Account Aggregation		X	X
	Personal Insurance Planning		X	X
Financial Planning & Consulting	Real-Time Comprehensive Financial Plan		X	X
	Detailed Reporting & Progress Tracking		X	X
	Retirement Income Strategies		X	X
	Social Security & Medicare Planning		X	X
	Retirement & Life Transition Planning		X	X
	Multiple Goal Planning		X	X
	Cash Flow/ Budget Analysis		X	X
	Roth IRA Conversion Analysis		X	X
	Education Planning		X	X
	Tax Planning Considerations		X	X
	Basic Estate Planning		X	X
	Executive Compensation & Stock Options		X	X
	Charitable Planning Techniques			X
	Complex Trust and Estate Planning			X
	Business Succession Planning			X
	Business, Rental, and Entity Planning			X
	Family Financial Education			X
	Family Wealth Planning			X
	Full Collaboration With Third Party Professionals			X

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