



Financial Coaching Options

Package	Get Organized	Organized	Organized and Beyond
Cost	\$50 per month	\$75 per month	\$125 per month
Great for	Budgeter that needs some self guided help	Recent College Grads, needing a total reset/accountability partner, new widows/widowers, starting to help aging parents with their finances	Beginner Investor that needs to learn the basics and still some help budgeting
Review and help organize Financial Documents	X	X	X
Budget Assessment/Cash Flow Analysis	X	X	X
Financial Wellness Assessment/Create Financial Goals (long and short term)	X	X	X
Access to Financial Planning Aggregator with budgeting tool to track spending	X	X	X
Employer Benefits review	X	X	X
Email and phone support	X	X	X
Initial Setup meeting – in person or Virtual	X	X	X
Budget/Check-up Meetings with Financial Coach		5 per year	6 per year
Investment education session with Financial Advisor/CFP®			2 per year

Tomball
1100 W Main St
Suite 223
Tomball, TX 77375

Houston
1770 St James Pl
Suite 360
Houston, TX 77056

Washington County
105 E Main St
Suite 104
Brenham, TX 77833

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