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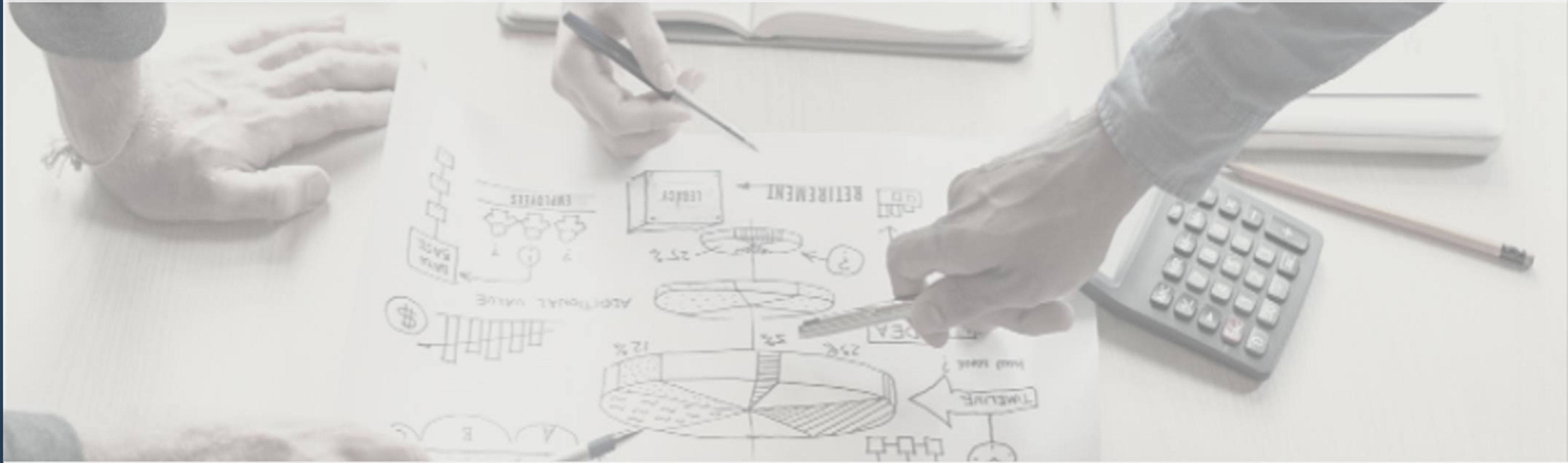
sovran
ADVISORS

Fee-Only Advice

Your values. Your priorities. Your goals.

We understand that managing your financial situation goes beyond numbers; it must consider your unique goals, values, and preferences continually. Supported by a team of in-house resources and specialists, our credentialed financial advisors engage you with a hands-on, ongoing approach to craft financial strategies for achieving your most important financial goals—empowering you to make informed financial decisions at every step of your journey.



How Can a Financial Planner Help You?

- Balance competing priorities.
- Grow & protect your wealth.
- Plan for retirement.
- Leverage tax-saving strategies.
- Get organized.
- Payoff debt & borrow smarter.
- Manage significant life events.
- Coordinate your estate & plan for future generations.

ADVICE

APPROACH

PRICING

ENGAGEMENT

360°
APPROACH

Actionable advice with tangible outcomes that helps you get organized, gain greater command, and make more informed financial decisions.

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Which Plan Is Right for You?

	Premium	Professional	Entry
	"Do-It-For-Me"	"Do-It-With-Me"	"Do-It-Yourself" with guidance
	From $490 monthly	From $325 monthly	From $140 monthly
BEST FIT	*"I want a hands-on, highly-customized plan with concierge support and guidance in key areas of personal and business development and decision-making guidance."*	*"I want advice on multiple financial goals and responsibilities and need guidance with how to best position my financial situation."*	*"I want to get organized, develop and prioritize goals, and implement my financial action plan."*
PLANNING TYPE	***Comprehensive***	***Extensive***	***Simplified***
ENGAGEMENT LEVEL	***Concierge*** √ On-demand strategy sessions √ Unlimited situational calls	***Customized*** √ Up to 3 strategy sessions, annually √ Up to 8 situational calls, annually	***Standardized*** √ Up to 2 strategy sessions, annually √ Up to 4 situational calls, annually

Complimentary Services

Access to a secure personal financial website is free for all planning clients with customized levels of service and support for each package:

	Total	Essential	Standard
PERSONAL FINANCIAL WEBSITE	√ Custom-built planning website √ Priority support	√ Tailored planning website √ Scheduled and automated support	√ Basic planning website √ Automated support

Not seeing what you're looking for?

Let us know and we'll arrange a time with you to discuss your individual needs.

1 Get to know you

Getting to know each other is the first step in establishing a great relationship. This is a great time to answer any questions that you have and to explore how your planner can help you achieve important financial goals.

2 Understand your situation

Gaining deeper perspective and insight about your most important life and financial goals sets the foundation for orchestrating and developing goals-based strategies that serve your preferences and unique financial situation.

3 Engage & Explore options

Your planner will guide you through ongoing engagement and services offerings so that you can determine the one that's right for you. With your selected services and a recurring meeting schedule in hand, your planner will begin working with you to prioritize your goals and explore aligned strategies.

4 Put your strategies into action

On an ongoing basis, your planner will actively engage with you to put each financial strategy in motion, making sure that every detail is covered and running smoothly, and that you have 24/7 access to all strategies via your secure, convenient, and easy-to-use personal financial website.

5 Work with you to stay on track

Regular strategy sessions with your planner are essential for progressing toward your short-term objectives and long-term goals. These meetings provide the opportunity to introduce new strategies and fine-tune existing ones based on performance and any changes in your financial circumstances and preferences.

* Please note that you can implement your financial plan at the financial institution of your choice. Implementation of specific products or services may result in commissions or fees outside of the financial plan fee.

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