Resolute
WEALTH MANAGEMENT

Details of the Big Picture

Financial Planning & Consulting Services

Services

Discovery
- Identify financial goals and create a basic financial plan
- Develop a budget if needed

Retirement Planning
- Develop basic retirement plan
- Determine savings needed to reach retirement goals

Tax Planning
- Review tax returns annually

Real Estate Review
- Primary residence and rental properties

Insurance Review
- Review life, disability, property & casualty insurance, etc.
- Offer recommendations to address any shortfalls

Communication
- Receive periodic market commentary videos from our Chief Investment Officer, Rick Wedell

Investment Management
- Review existing investment accounts
- Discuss investment strategies

Estate Review
- Ensure wills and trusts are up to date
- Facilitate connection with local attorney if needed

Employer Benefit Review
- Review insurance, retirement, and other benefits

Debt Review
- Develop plan to pay off debt efficiently
- Organize and prioritize mortgage, student loans, auto loans, credit card debt, etc.

Online Access & Account Consolidation
- Provide complimentary online portal (FETCH) for access to all financial assets, liabilities, and financial plan

Cost

Monthly Subscription
- 12-month subscription
- Starting at $250 per month
- Payable monthly via debit, credit, or EFT

Live Free.

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Items to be Discussed:

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Special Notes