

# FAMILY WEALTH PROGRAM



## EXCLUSIVELY FOR THE ADULT CHILDREN OF OUR VALUED CLIENTS

As your children graduate college and begin working in their new careers, making smart financial decisions is critical to long-term success. Most schools do not provide or require students to take courses in financial planning, so even the basic money management concepts may not be understood. A traditional relationship with a financial advisor may not be viable, so we developed the Family Wealth Program to fill this important need.

Recent college graduates have not accumulated enough assets for a financial advisor to manage for a fee, and typical financial planning fees may be beyond their budget. Yet getting sound financial advice for your loved ones is no less important. **Synthesis Wealth Planning** developed a program whereby young professionals can get the advice they need, in a format, they are accustomed to, and at a cost they can afford!

## WHAT TO EXPECT FROM OUR FAMILY WEALTH PLANNING PROGRAM

We've priced the Family Wealth Program to be affordable for young adults just starting out or for parents who want to provide this service for them. The initial set-up fee covers the time and resources needed to set up their own personal financial website and to develop an understanding of their income, employer benefits, savings capacity, spending needs, and help them establish short and long-term goals. The monthly subscription fee covers the ongoing and regular coaching sessions and planning maintenance. As their lives evolve, so will the advice and strategies.

## OUR COACHING PROCESS

We approach each new engagement with a consultative process. This allows us to have an open dialogue in which we learn about each client's values and concerns and provide guidance consistent with those values. While young adults may not have a clear vision of their long-term future, there are essential planning strategies that can help regardless of the path they follow.



## CONTACT US

✉ [contact@synthesiswealth.com](mailto:contact@synthesiswealth.com)



[synthesiswealth.com](https://www.synthesiswealth.com)

📍 161 Madison Ave., Ste. 200, Morristown, New Jersey



(973) 601 5020

Securities offered through Kestra Investment Services, LLC (Kestra IS), Member FINRA/SIPC. Investment Advisory Services offered through Kestra Advisory Services, LLC (Kestra AS), an affiliate of Kestra IS. Kestra IS and Kestra AS are not affiliated with Synthesis Wealth Planning, LLC. Investor Disclosures: <https://bit.ly/KF-Disclosures>.