Plan Intentionally. Live Generously.

INTENTGEN
FINANCIAL PARTNERS

We all have different relationships with our finances.

Understanding every aspect of personal finance can be daunting. Choosing how to use our money can bring up feelings of doubt, guilt, worry and more. From investments to retirement to insurance, the decisions can be overwhelming. **But you don't have to navigate these complexities on your own.**

How much better would you feel if you…

- **Organized** your finances to simplify the complex
- **Prioritized** your financial decisions to align with your values
- **Strategized** and evaluated methods to reach your goals
- **Maximized** the possibilities and impact of your financial resources

A Wise with Money Partnership from IntentGen Financial Partners will help you do all that and more.

Your Wise with Money Partnership

You are unique. So are your finances. We believe you deserve personalized care and attention when it comes to financial planning, which is why we offer multiple paths to help you reach your goals. No matter your situation, having a clearly defined financial plan can help make living an intentional, generous life more attainable.

During our on-going partnership, we'll help you:

- **Control** your cash flow and know your "net"
- **Protect** your plan and people
- **Accelerate** your progress toward your goals
- **Optimize** your portfolio through asset location and allocation
- **Maximize** your financial efficiency by minimizing your fees, risks, and taxes

All levels of a Wise with Money Partnership include:

- Personalized advice by a dedicated Financial Advisor
- Review of your plan by a Certified Financial Planner
- A proven process to keep you thoughtful and accountable as you explore the best ways to use your money
- Access to a comprehensive client experience including exclusive social, educational, and charitable events

Deliverables:

- Net Worth Summary and Financial Projections
- Tax Efficiency Checklist to focus on the purpose of your money (and the best way to use dollars that are taxed now, later, or never)
- Written summaries of recommendations and advice
- Guidance on topics you may not be thinking about
- Quick responses on questions as they arise

Busy is Not an Excuse.

Life is full of many things but you still have financial goals. Many clients need a deeper level of planning due to complex financial situations, while others may need something more streamlined to help get them started and monitor their plan. We can help you choose the IntentGen partnership option that's right for you—and bring your plan to life.

Be Intentional	Be Innovative	Be Visionary
Evaluate retirement plans and investment options to determine your best fit Interact with us and our industry-leading software to aggregate your finances and monitor progress Align asset allocations to match investment goals Review insurance including life, disability, long-term care, and company benefits Review beneficiaries for accuracy and purpose	*Includes Be Intentional plan plus:* Prepare and compare projections for utilization phase (retirement) Create a distribution strategy for retirement income that minimizes taxes and risk. Explore creative generosity: donor advised fund, qualified charitable distributions Review paycheck/tax withholdings Plan ahead for tax impact of Medicare brackets, Roth IRA conversions, etc. Evaluate stock options/restricted stock units Employee stock purchase plan	*Includes Be Innovative plan plus:* Plan for life transition events (death, retirement, major job changes, second home) Develop your long-term estate plan Facilitate reviews, as needed, with your Accountant and Attorney Share proprietary asset allocation models Receive advice/guidance on specific external stocks/funds/ investments Coordinate business finances and personal finances
$1,500 ***Meet with us 1-2 times annually***	**$2,400** ***Meet with us 2-3 times annually***	**$3,600+** ***Meet with us 2-3 times annually***

Innovative and Visionary services are provided, as needed, for the base planning fee for those whom IntentGen Financial Partners is managing $1,000,000+ in Investment Advisory accounts.

Financial planning services described above are provided, as needed, for no additional planning fee for those whom IntentGen Financial partners is managing more than $2,000,000 in Investment Advisory accounts. .

Investment Advisory Management fees are reduced for accounts with smaller balances for clients that are engaged in a Wise With Money Partnership. (see Partnership schedule)

Your Partners in Intentional Living

Knowledge and support makes all of the difference when it comes to realizing your financial goals. Our team will empower you with services that support and share your life's vision, while working to turn your financial dreams into reality.

Each client has a dedicated:
1. Financial Advisor to listen, guide, and direct your plan.
2. Planning Coordinator to assist with the organization and maximization of your plan.
3. Service Coordinator to help with action items to ensure your plan stays on track.

Ways to Work Together

Investment Advisory
Asset Management

Financial Planning
Wise With Money
Partnership

Solutions and strategies for insurance and investments

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