



Wealth Builder

Client Profile:

Looking to take a foundational approach to financial planning for those in the accumulation phase of their careers.

Services We Offer:

- ✓ Cash Flow/Budgeting
- ✓ Wealth Management
- ✓ Insurance Planning
- ✓ Estate & Legacy Planning

Recommendations and ongoing monitoring delivered through comprehensive client technology package.

Cost Structure:

Annual minimum fee of \$3,000, billed as a flat rate of \$250 per month, or a minimum investment of \$300,000 with StatonWalsh

Securities and Investment Advisory services offered through Founders Financial Securities, LLC. Member FINRA/SIPC and Registered Investment Advisor.

GET STARTED TODAY

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