Financial Planning Services

Essential – Tier 1 Ideal For: Individuals looking to organize their financials and plan for the future- "Accumulator"	**Advanced - Tier 2** Ideal For: *Individuals or Families looking to prioritize, execute, and monitor financial goals- "Retirees"*	**Premier – Tier 3** Ideal For: *Individuals, families, and/or business owners with complex financial needs- "Distribution & Legacy"*
✓ Investment Review ✓ Quarterly Newsletter ✓ Retirement Check-up ✓ Goal Monitoring ✓ Online Financial Portal ✓ Behavioral Financial Coaching ✓ Financial Guidance and Counsel ✓ Email and Phone support ✓ Annual Meetings	**Tier 1 Plus:** ✓ In-depth financial plan ✓ Retirement Income Planning ✓ Detailed Cash Flow Analysis ✓ Roth Conversion Review ✓ Multiple Goal Analysis ✓ Risk Analysis ✓ Basic Estate Planning ✓ Year End Tax Planning ✓ Semi Annual Meetings	**Tier 2 Plus:** ✓ Wealth Transfer Planning ✓ Stock Option Analysis ✓ Charitable Giving Strategies ✓ Business Planning ✓ Advanced Tax Planning ✓ Collaboration with Third Party Professionals ✓ Family Wealth Planning ✓ Quarterly Meetings
Initial Plan/Setup: $1,500+	***Initial Plan/Setup: $3,000+***	***Initial Plan/Setup: $5,000+***

The term of the initial planning engagement is one year and is included in the initial set up fee. After the first year, ongoing financial planning costs may be included with your assets under management fees as a Wealth Management Client or paid out of pocket $1,000/year.

Hourly Planning & Consulting

For clients who do not desire a complete financial plan, I offer ala carte planning services starting at $250/hour depending on your situation and needs. Hours will be estimated and proposed on a project-by-project basis