



Comprehensive Planning Approach

Client Profile:

Looking to take a holistic approach to financial planning. Clients see value in partnering with an experienced advisor to assist in organizing and coordinating their financial lives. Clients typically engage in an ongoing process to analyze, adjust and implement a financial road map to reaching their goals. Client may be looking to retain someone that they can consult with at any time for any financial matter.

Services We Offer:

- ✓ Ongoing Consulting
- ✓ Cash Flow / Budgeting
- ✓ Retirement Planning
- ✓ Wealth Management/ Investment Advisory
- ✓ Strategic Opportunity Planning
- ✓ Insurance Planning
- ✓ Estate & Legacy Planning
- ✓ Specialty Planning (Education, Charitable, and Debt Planning)
- ✓ Tax Strategy
- ✓ Business Consulting*

Recommendations and ongoing monitoring delivered through comprehensive client technology package.

*Businesses under \$2mm in gross revenue

Cost Structure:

Annual minimum fee of \$6,000, billed as a flat rate of \$500 per month, or a minimum investment of \$600,000 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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