Financial Planning & Wealth Management Services

BARNUM FINANCIAL GROUP
THE SKG TEAM

Complimentary Needs Analysis

High level overview of your financial position

Wealth Management

Implementation

Advice and analysis based on gaps identified during the complimentary needs analysis:

- **Formal investment proposal**
- **Insurance recommendations**

Financial Planning

Focused Plan

Select **three** financial planning areas to integrate:

- Three plan design meetings
- Up to 3 Decision Center scenarios
- One mid-year review
- Portfolio volatility & risk assessment

$95.00 per month
ongoing until canceled, 1 year minimum

"Personal CFO" Plan

Integrate **ALL** areas of financial planning holistically:

- Four plan design meetings
- Unlimited Decision Center scenarios
- Two semi-annual reviews
- Portfolio volatility & risk assessment
- PFV website & concierge
- Open enrollment benefit review
- Estate document review
- Annual property & casualty review

$170.00 per month
ongoing until canceled, 1 year minimum

Implementation Assistance as Requested

Financial Planning Areas of Focus

- ☐ Financial Position
- ☐ Protection Planning
- ☐ Education Planning
- ☐ Retirement Planning
- ☐ Tax Management
- ☐ Estate Planning
- ☐ Company Stock & Option Planning
- ☐ Other Accumulation Goals