Ways We Can Work Together

For those to wish to engage with us beyond the **complimentary needs analysis,** we offer flexible financial planning and investment management solutions tailored to your needs.

Financial Planning Areas of Focus

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

'Personal CFO' Plan

For clients looking for comprehensive, holistic guidance across all areas of personal finance—who prefer to manage their own investments but still want professional planning insights.

What's Included

- Decision Center scenarios
- Regular reviews & updates
- Portfolio volatility & risk assessment
- Estate document review
- Annual property & casualty review

Additional Benefits of Being a Client

- Personal Financial View website
- Tax return analysis through HolistiPlan
- Access to Cyber Liability Insurance
- Access to CFP's, CPA's, CFA's, and JD's

$500 / Month*
(1 year minimum until canceled)

Planning + Action

Start with a focused financial plan with the intention to integrate and implement investment strategies with our team:

What's Included

- Plan Design meetings
- Decision Center scenarios
- Collaborative investment strategies

$250 / Month*
(1 year engagement)

Implementation

Wealth Management Services

Clients seeking professional investment management with a tailored, 3-bucket strategy to meet their objectives and grow wealth effectively.

Protection Solutions

- Life insurance
- Disability Income insurance
- Long-Term Care insurance
- Property & Casualty Insurance

Add ongoing planning for
$100/Month

*Fees for Financial Planning Services are negotiable. Your actual fee will be disclosed on your Financial Planning Services Agreement. Please note that you can implement your financial plan at the financial institution of your choice.

Representatives do not provide tax and/or legal advice. Any discussion of taxes is for general informational purposes only, does not purport to be complete or cover every situation, and should not be construed as legal, tax or accounting advice. Clients should confer with their qualified legal, tax and accounting advisors as appropriate. Securities, investment advisory and financial planning services offered through qualified registered representatives of MML Investors Services, LLC. Member SIPC. 6 Corporate Drive, Shelton, CT 06484, Tel: 203-513-6000. Some health insurance products and auto and home insurance are offered by unaffiliated insurers. CRN202807-8813481