

Financial Planning & Wealth Management Services

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

\$195.00 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

\$325.00 per month
ongoing until canceled, 1 year minimum

Implementation Assistance as Requested

Financial Planning Areas of Focus

- | | | |
|--|--|--|
| <input type="checkbox"/> Financial Position | <input type="checkbox"/> Retirement Planning | <input type="checkbox"/> Company Stock & Option Planning |
| <input type="checkbox"/> Protection Planning | <input type="checkbox"/> Tax Management | <input type="checkbox"/> Other Accumulation Goals |
| <input type="checkbox"/> Education Planning | <input type="checkbox"/> Estate Planning | |