POPULAR PACKAGES

STARTER $800

2-month engagement,
2 meetings
Best for clients who want better understand their financial situation,

- *Access to online Portal*
- *Tax Return Review*
- *Tax Planning Strategies*
- *Cash Flow Planning*
- *Financial Goal Planning*

STANDARD $1500

4-month engagement,
4 meetings
Best for clients who DIY their investment management,

- *Access to online Portal*
- *Tax Return Review*
- *Tax Planning Strategies*
- *Cash Flow Planning*
- *Financial Goal Planning*
- *Goal Planning and Budgeting*
- *Insurance Review*
- *Retirement Income Plan*
- *Estate Planning Checklist*

ONGOING $200*/MO

Ongoing engagement,
6 meetings in the first year, 2-3 meetings in subsequent years. Email and phone check-ins.
Best for clients who have more complex financial planning situations

- *Access to online Portal*
- *Tax Return Review*
- *Tax Planning Strategies*
- *Cash Flow Planning*
- *Financial Goal Planning*
- *Investment Review*
- *Goal Planning and Budgeting*
- *Insurance Review*
- *Retirement Income Plan*
- *Estate Planning Checklist*
- *Employee Benefits Optimization*
- *Business Planning*
- *Joint Meetings with Other Financial Professionals*

HOURLY $250/H

Best for clients who want to discuss a specific topic

- *Access to CFP(R) Professional for a specific topic*

IMPORTANT NOTES ABOUT THE PACKAGES

- *Investment Management is provided as a separate service and is not included in the above packages*
- *"Starter" and "Standard" are flat-fee packages and represent a limited scope Financial Advice on specific stand-alone topics described in each package*
- *"Ongoing Engagement" represents comprehensive financial planning which takes into consideration the whole financial picture of the client, the $200 is* starting *price and* goes up *depending on complexity, which will be discussed during the introductory call.*