

# Financial Planning

## PROCESS AND FEES



01

### PROSPECT CALL: 30 MINUTES

This is a 30-minute, complimentary phone call where we talk about the process and fees, and get to know one another to see if we are the right fit.

If we decide to work together...

02

### KICKOFF PART 1: 90 MINUTES

Initial meeting where we go over the information provided and talk about goals and your current situation.



03

### KICKOFF PART 2: 60 MINUTES

Second meeting to follow up and talk about other topics such as cash flow, investment, taxes, insurance, benefits, future goals, and what you want your life to look like.

04

### THE INITIAL ONBOARDING FEE

Will cover:

- Review of your information and first analysis
- Initial 90 minute meeting and second 60-minute meeting
- Preparation for scenarios that support your goals and objectives outlined in initial meeting.
- Follow up analysis and action items. Assist with implementation, monitoring, and support of your planning efforts

05

### THE ONGOING MONTHLY FEE

Will cover:

- Quarterly meetings in the first year, and then transitioning to meeting twice a year.
- Check-in calls as needed in between Review Meetings.
- Follow up analysis and action items. Assist with implementation, monitoring, and support of your planning efforts