



	Hourly Planning	Full Financial Plan
One-on-One with a CFP®	X	X
Follow Up and Questions	X	X
Values Discussion	X	X
Written Plan Document		X
Access to Software/App		X
Investor Profile Questionnaire		X
Investment Advice		X
Retirement Planning		X
Goal Setting		X
Budget Development		X
Cash Flow Analysis		X
Debt Management		X
College Savings		X
Insurance Policy Review		X
Estate Planning Considerations		X
Tax Savings Strategies		X
Plan Implementation		X
Accountability		X
Ongoing Monitoring		X
Guidance During Life Events		X
Financial Check-Ins		X
Ongoing Advice		X
Length of Engagement	1 - 3 hours	Indefinite
Number of Meetings	1 - 2	Unlimited*
Fees	\$250/hr.	\$2,500** up front + monthly (varies)

*Up to 6 meetings in 1st year and 2 formal meetings each subsequent year, however, meetings can be requested at any time. E-mail and phone support are unlimited.

** Price for an individual (single).