



	Hourly Planning	Retirement Plan	Full Financial Plan
One-on-One with a CFP®	X	X	X
Follow Up and Questions	X	X	X
Values Discussion	X	X	X
Written Plan Document		X	X
Access to Software/App		X	X
SWOT Analysis		X	X
Investor Profile Questionnaire		X	X
Investment Advice		X	X
Retirement Planning		X	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	30 days*	Indefinite
Number of Meetings	1 - 2	3 - 4	Unlimited**
Fees	\$225/hr.	\$599 - \$999	\$2,000 up front + monthly (varies)

\*Once all information is gathered.

\*\*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.