

Subscription Based Financial Planning

Value of our Subscription Process

Since each client has different needs and revolving financial goals, our subscription agreement will be customized to your specific needs. However, our first year of working together will include some or all of the following:

- Cash Flow Analysis
 - » Review Cash Flow and develop a monetary budget
 - » Discuss debt repayment strategies
 - » Assess how much should be saved each month
 - » Decide how much to put aside for retirement and where to save those funds
 - » Determine how much you can save for your child's education
 - » Review student loan repayment options
- Investment Management
 - » Develop an Investment Policy Statement to create a customized asset allocation
 - » Determine where and how to invest your savings
- Insurance Planning
 - » Determine potential insurance gaps
 - » Choosing what type of insurance is needed
- Tax Planning
 - » Reviews savings strategies to minimize potential tax liabilities
 - » Reviews tax return with CPA for deduction opportunities
- Estate Planning
 - » Review Legal Documents in coordination with Estate Attorney
 - » If applicable, introduction and coordinated development of legal documents with Estate Attorney
 - » Review account beneficiaries and update if needed.

Subscription Includes the Following:

- 4-6 meetings, each lasting nearly 1 hour
- Access via phone or email throughout the year
- Personal Client Website

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* COMPANY INFO GOES HERE

* DISCLOSURE GOES HERE