



## Financial Wellness Planning/Coaching Program

<b>Create a plan to organize financial house around goals and values. Includes proactive guidance, actionable recommendations, and continual follow-up.</b>	<b>\$400-\$600/month</b> (depending on complexity)  <i>Minimum six-month commitment</i>
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## Investment/Wealth Management

	<b>Assets Under Care</b>	<b>Annual Fee</b>
<b>First</b>	<b>\$500,000</b>	<b>1.45%</b>
<b>Next</b>	<b>\$500,000 - \$1M</b>	<b>1.00%</b>
<b>Next</b>	<b>\$1M - \$2M</b>	<b>0.75%</b>
<b>Above</b>	<b>\$2M</b>	<b>0.50%</b>

## Employer-Sponsored Retirement Plan Management

<b>Ongoing guidance and management of employer-sponsored plans (401k, 403b, 457 plan, etc.).</b>	<b>\$75/month</b>
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## Sample Financial Wellness Services Offered:

- Achieve Financial Independence
- Career/Job Change Salary/Benefit Analysis
- Caregiver Resources/Coordination
- Death/Divorce/Disability Planning
- Education Funding/Planning
- Employer Benefits Guidance
- Employer Retirement Plan Management (401k, 403b, 457, etc.)
- Estate Plan Review/Coordination
- Evaluate Cash Flow/Debt Payoff
- Fixed Income Review/Options
- Home/Auto Insurance Review
- Investment Planning/Analysis
- Life Insurance Needs/Policy Review
- Long-Term Care Planning/Insurance Review
- Organize Financial House
- Pension Option Analysis (lump sum vs monthly payments)
- Medicare/Medicaid Planning/Coordination
- Retirement Income/Lifestyle Planning
- Social Security Maximization
- Tax Planning/Reduction Strategies
- Other (refinance/mortgage payoff evaluation, buy vs lease, vacation/rental home considerations, targeted savings, etc.)