



Financial Wellness Planning/Coaching Program

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

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

Employer-Sponsored Retirement Plan Management

Ongoing guidance and management of employer-sponsored plans (401k, 403b, 457 plan, etc.).	\$75/month
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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.)