



Taking a personal interest  
in your financial well-being

## Advisory Services

**You will be heard. You will be involved. You will be empowered.  
You will understand. You will be accountable.**

### **Complimentary Exploration Meeting:**

A time to get to know you and what is important to you.  
A time for you to get to know me, and my unique approach to financial life planning.  
A time to determine if our services fit your needs and decide on a direction for working together.

### **All Engagements are based on complexity and scope of service**

Journey of Financial Health Program \$3,000 +  
One year commitment – ½ fee upfront; remainder on a monthly subscription

#### Modular

SS Maximization Report/Health Care expense	\$ 400	flat fee
Life Insurance Analysis	\$ 750	+
Education funding Planning	\$ 500	+
Estate Planning	\$ 1,000	+
Charitable Planning	\$ 1,000	+

### **Journey of Financial Health - discounts for managed clients:**

Premier Wealth service level – Above \$1,000,000	50%
Executive Wealth service level – Between \$500,000 - \$999,999	25%
Wealth Builder service level – Between \$250,000 - \$499,999	15%

**Hourly Financial Advisory Fee :** \$250.00/hr

**Behavioral Finance Coaching:** \$150.00/hr

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