



*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

Journey of Financial Health - discounts for managed clients:

Ocean Service Level	50%
River Service Level	25%
Stream Service Level	15%

Hourly Financial Advisory Fee : \$250.00/hr

Behavioral Finance Coaching: \$130.00/hr

23300 Two Rivers Rd, Suite 34 • Basalt, CO 81621 • p: 970.927.3909 • f: 970.927.7643 • e: danielle@wbd4u.com • www.WealthByDesign4U.com

Registered Representative, Securities offered through Cambridge Investment Research, Inc., A Broker/Dealer, Member FINRA/SIPC.
Investment Advisor Representative, Cambridge Investment Research Advisors, Inc., A Registered Investment Advisor. Cambridge and Wealth By Design, LLC are not affiliated.