

# Financial Consulting Menu of Services

	Fundamental	Essential	Custom
<b>Service Standards</b>			
Ongoing Meeting Frequency	Annual	Semi-Annual	Quarterly
Pre-scheduled phone check-ins	1	2	4
Client Inquiry turnaround time	1-2 business days	1 business day	24 hrs.
Accountability Partner	X	X	X
<b>Client Benefits</b>			
Online Financial Organizer	X	X	X
Account Aggregation	X	X	X
Secure Document Storage	X	X	X
Budgeting Tools	X	X	X
Financial concept education	X	X	X
Weekly market insights	X	X	X
Client Appreciation Events		X	X
<b>Financial Planning Consulting</b>			
Investment allocation advice	X	X	X
Real-Time Comprehensive Financial Plan	X	X	X
Detailed Progress Tracking & Reporting		X	X
Collaborative Financial decision making		X	X
Employee Benefit Review		X	X
Tax Planning		X	X
Insurance review		X	X
Beneficiary audit		X	X
Basic estate planning		X	X
Education Planning		X	X
<b>Cost Structure</b>			
Initial On-Boarding Payment	\$900	\$1,500	\$3,000
Ongoing Monthly	\$150	\$200	\$499 +

*Payments can be made by credit card or bank ACH. The fee will increase by 3% per year to account for inflation.*