

# FINANCIAL PLANNING

## Comprehensive Financial Planning

Best for individuals and families looking to maximize their financial resources with the guidance and coaching of a CFP® Professional. This covers every element of your financial life with a deep emphasis on incorporating your goals and values into your plan. We work together as a team to plan proactively.

- The fee consists of an upfront charge for the initial plan development + an annual planning fee paid quarterly ( 0.25% of investment assets per quarter).
- The first 90 days are spent building an initial financial plan. After that, we have semi-annual plan update meetings.
- Ongoing implementation support + access to advanced planning tools, investment models, and more.
- Includes tax planning services at no additional cost.
- Unlimited access to a CFP® Professional.

## INVESTMENT MANAGEMENT



We develop and implement a long-term investment plan with a focus on tax-efficiency.



Access to low-cost and globally diverse mutual funds from Dimensional Fund Advisors (DFA).



Ongoing behavioral coaching to help you achieve your investment goals.



Access to institutional level management, rebalancing, and tax strategies.