

FINANCIAL PLANNING OPTIONS

One-Time Financial Planning

Best for individuals who are just getting started. This includes a complete evaluation of your current situation with recommendations. Individuals are responsible for implementation.

➔ Includes 3-4 meetings (virtual).

➔ 12-month financial roadmap with implementation steps.

➔ 3 month complimentary check-in after final meeting.

➔ Covers every aspect in your financial life.