

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.
- The first 90 days are spent building an initial financial plan. After that, quarterly or semi-annual reviews.
- Ongoing implementation support + access to advanced planning tools, investment models, and more.
- Includes tax filing services for certain clients 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.



Offered at no additional cost for certain clients.