Planning Process

Investments are just one part of your financial strategy. Our comprehensive planning process analyzes all other aspects to ensure your finances work efficiently, effectively, and most importantly: **for you.**

Planning Phases

Fact Gathering: 1-2 Meetings

We will work together to collect information on income, expenses, insurance, properties, businesses and other pieces of your financial picture.

We will then help you identify your goals and top priorities

Deep Dives: 3-4 Meetings

Once we have all of the details, we will work through each topic, beginning with your priorities. Together, we will identify gaps, efficiencies, strategies and plans.

- Financial Organization
- Retirement Planning
- Tax Efficiency & Distribution Planning
- Risk Analysis
- Investment Planning
- Insurance Gaps
- Social Security Timing
- Estate & Legacy Planning
- Charitable Giving Strategies
- Business Succession Planning

Plan Delivery & Lifetime Adjustments

After working through each area thoroughly, you will receive your documented plan. As life changes, we'll be right beside you to update and evaluate as you need.

Financial Planning Pricing Guide

The first meeting is always complimentary and provides a quote for your process.

Foundation Plan Level

This complimentary plan is a simplified version of our comprehensive planning process; includes one meeting of output review. Offered to existing clients.

Comprehensive Plan Levels

Plans priced based on your financial complexity

$2,500

Retirement Assets

Home Property

Investment Accounts

Mortgage, Car Payment, Debts

$3,500

Small Business Owner

1-2 Investment Properties

Properties in Multiple States

Legacy Planning for Blended Families

$5,000+

Business Partnerships

Medium to Large Business Ownership

3+ Investment Properties

Complex Estate Planning Analysis

***Investment clients of $1M or more under management receive a 50% discount**