VALOR INVESTMENTS & PLANNING

How We Work Together

Four ways to engage — built around where you are and what you need.

VALOR
Investments & Planning

One-Time Plan

"Done Together"

A comprehensive financial plan built around your situation — delivered via Loom with full context, if/then scenarios, and 30 days of email support.

$3,000 – $7,500

Ongoing Planning

"Done Together — Ongoing"

A living financial plan updated and executed every year. 3–4 proactively scheduled calls. No limit on scope — for as many years as it takes.

$5,000 – $12,000 / yr

Investment Management

"Done For You"

Thematic, macro-aware portfolio management with quantitative analysis. Core and satellite structure. Custodied at Charles Schwab. Annual review. $250K minimum.

From 1.5% all-in

Holistic Wealth Management

MOST COMMON

"Done For You — Comprehensive"

Ongoing financial planning and investment management working together. Two separate agreements — each can be added at any time. Clients who do both receive a discounted investment management fee of 1.3% all-in. No minimum account size.

From 1.3% + Planning Fee

AREAS WE COVER

- Tax Strategy
- Retirement Planning
- Variable Income
- Investment Management
- Cash Flow
- Risk & Insurance
- Real Estate
- Estate Planning
- Equity Compensation
- Deferred Compensation