



One-Time Financial Plan

"Done Together"

A comprehensive financial plan built around your income, accounts, goals, and tax picture — delivered via recorded Loom walkthrough with if/then scenarios for every decision point throughout the year. You leave with a clear roadmap and 30 days of direct access to ask questions as you implement.

WHAT'S INCLUDED

- **Discovery Call** — first conversation to confirm fit and scope

- **Data Gathering Call** — collect income, accounts, goals, insurance, and more

- **Comprehensive Financial Plan Document** — tax strategy guidance, retirement savings, cash flow, insurance, and a prioritized action list

- **Loom Video Walkthrough** — recorded walkthrough of the full plan with if/then scenarios for each decision point throughout the year

- **30-Day Email Support** — direct access to Chris for 30 days after delivery, plus ongoing access to the Loom and plan document

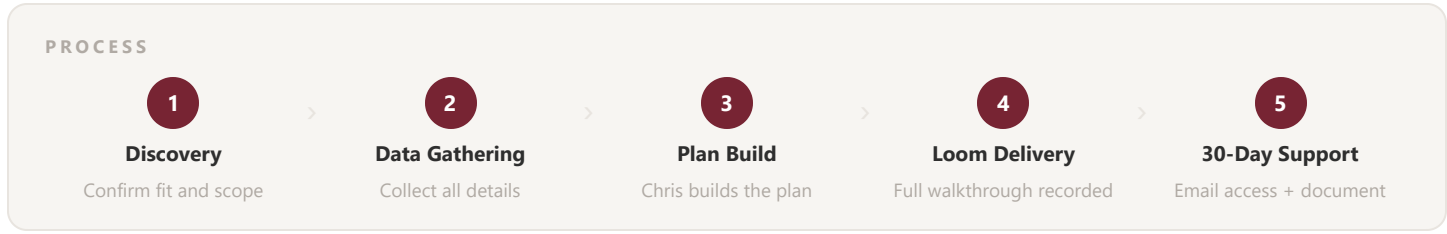
PLANNING FEE

\$3,000 – \$7,500

Based on complexity. Agreed upon before work begins.

AREAS COVERED

- Tax Strategy
- Retirement Savings
- Cash Flow
- Insurance Review
- Debt Strategy
- Account Structure
- Variable Income
- Employee Benefits



This agreement covers financial planning only. Investment management is a separate engagement with its own agreement. The two can be paired together at any time — clients who do both execute both agreements and receive a discounted investment management fee.