

Financial Plan Comparison



Description of Service Included with Plan	Basic \$500	Fresh Start \$1,000	Empowered Life \$2,500
Number of Client Meetings	2	3-5	6-7
Basic Planning Analysis (Where are you now and what do you need to do to get to where you want to be?)	✓	✓	✓
Net Worth Analysis	✓	✓	✓
Budget & Cash flow Management		✓	✓
Debt Management		✓	✓
Credit Score Repair		✓	✓
Establish & Track Goals		Basic	✓
Investment Counselling & Management		Basic	✓
Insurance Planning and/or Review		Basic	✓
Tax Preparation/Planning		50% off Prep - Basic Planning	✓
Advanced Planning Analysis			✓
Retirement Planning			✓
Transition Planning			✓
Estate Planning			✓
Education Planning			✓
Charitable Giving Planning			✓

**Business and Corp. Tax Prep, strategies and planning will be separately quoted depending on scope of the project*