Partnership Opportunities

Each planning partnership includes customized financial planning software to facilitate an assessment of probability, progress reports to keep you on the right path, and written advice summary letters prepared in a fiduciary capacity. Choose the partnership level that fits you:

Be INTENTIONAL

$1,200/yr

A financial planning experience to help you begin your journey or maintain an existing financial plan.

Partnership Includes

- Assess **Probability** of Success
- Develop Cash Flow **Process** (money in/ money out)
- Explore **Possibilities** (1-2 annually)
  - a) Asset Allocation
  - b) Insurance Review
  - c) Group Benefits
  - d) Debt Payoff/Cash Flow
  - e) College Savings
  - f) Tax-Efficiency
  - g) Charitable Giving

Partnership Frequency

- Typically 2 meetings annually
- Certified Financial Planner (CFP) to advise you, plus planning coordinator and service coordinator to support and guide you along the way
- Opportunities for a social, charitable, or informational experience each year

Be INNOVATIVE

$2,400/yr

A customized planning experience to help you develop, coordinate, and maintain a more complex plan.

Partnership Includes

- Assess **Probability** of Success
- Develop Cash Flow **Process** (money in/money out)
- Explore **Possibilities** included in Intentional partnership (2-3 annually)
- Coordination of tax and legal aspects with your professional partners
- Charitable giving strategies and coordination with gift planners
- Detailed distribution strategies and advanced tracking of complex net worth

Partnership Frequency

- Typically 2-3 meetings annually
- Certified Financial Planner (CFP) to advise you, plus planning coordinator and service coordinator to support and guide you along the way
- Multiple social, charitable and informational experiences throughout the year

Be VISIONARY

$3,600+ /yr

A coaching and planning experience that requires a sophisticated level of advice, service, and coordination of a complex plan.

Partnership Includes

- **All services** included in **Intentional** and **Innovative** level partnerships plus advice and guidance on the following:
- Complex Net Worth
- Detailed cash flow
- Real Estate holdings
- Coordination of estate planning
- Business Planning
- Stock Options
- Envision a bigger future of generosity & generational planning

Partnership Frequency

- Typically 3-4 meetings annually
- Certified Financial Planner (CFP) assigned to you and planning coordinator to support and guide you along the way
- Exclusive social, charitable, informational experiences to help you plan intentionally and live generously

1460 Bond Street Suite 120 | Naperville, IL 60563 | Office: 630-821-6990 | www.intentgen.com

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