Planning for Good®
Put your Money where your Heart is.

Service Menu

On-going Financial Planning Services

Comprehensive analysis & advice throughout the year

> Identification of objectives and priorities
> Discussion of risk tolerance
> Review of income and living expenses
> Analysis of financial planning areas as needed:
- Cash flow and net worth
- Risk management and insurance
- Investment review
- Retirement planning
- Education planning
- Tax, estate and legacy strategies
> Personalized recommendations
> What-if scenarios
> Review of and coordination with estate documents
> Coordination with CPA and attorney, as needed

Investment & Retirement Planning

*Focused planning for a reduced annual fee**

> Identification of retirement goals and objectives
> Discussion of risk tolerance
> Review of income sources and expenses
> Mapping of savings and investments
> What-if scenario

Foundational Financial Strategies

*Planning basics for a reduced annual fee**

> Cash-flow analysis and creating a budget
> Discussion of risk tolerance
> Review options for savings and investments
> Evaluation of potential insurance needs
> What-if scenario

After the initial goal planning, we'll continue working together for on-going financial management and oversight. All financial plans come with a PFV collaborative client web portal for the duration of the planning engagement.

** Fees vary by individual needs and the complexity of your situation. We'll also review fees and services each planning year. Strategy implementation can be completed with the company of your choosing and may result in additional commissions or fees.*

Investment Management Services

(Advisory Accts., Fee as % of Assets)*

> Analysis of savings and investment accounts
> Discussion of objectives and risk tolerance
> Personalized portfolio design
> Assistance consolidating accounts as needed
> On-going monitoring and reviews
> Impact investing (SRI/ESG) available

Other Products & Services

> Life Insurance (term/whole/variable)
> Fortuna digital/advisory investments
> IRAs / Roth IRAs & 401(k) Rollovers
> Disability income insurance
> Long-term care insurance
> Annuities & income strategies

Schedule a meeting with me at calendly.com/planningforgood

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