Financial LifeLab Inc.

Creative Wealth Planning for Life

How we can work together

Build a more confident financial future

Professional Investment Management

Services Offered:

- Tailored investment advice based on client's risk tolerance and investment objectives.
- Ongoing market updates.
- Ongoing professional management of investments.
- Investment advice on all accounts managed by Financial LifeLab.
- Financial planning advice incidental to investment accounts serviced by Financial LifeLab, Inc.

Client Service Schedule:

- Up to 2 meetings per year for investment management.

Cost:

- Cost varies dependent on products and account types as well as level of engagement with Financial LifeLab, Inc.
- Initial consultations are free of charge.

Personalized Financial Planning

Services Offered through Sigma Planning Corporation:

- Comprehensive & Interactive goal-based advice.
- Goal Tracking.
- In-depth analysis on specific financial goal questions. (Ex: How much do I need to save for each of my goals? How do we plan so that I do not run out of money in retirement?)
- Proactive discussions on the primary 6 areas of Financial Planning:
  - Retirement Planning
  - Estate Planning
  - Investment Planning
  - Tax Planning
  - Education Planning
- Coordination with outside Professionals (attorneys, accountants, tax advisors).

Client Service Schedule:

- 2+ Meetings per year for Planning
- Up to 2 Meeting per year for investment management

Cost:

- $750 / Annual Fee (billed through SPC)

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