



## About Treece Financial Group

Led by David Treece, Treece Financial Group (TFG) is a full-service, fee-based, fiduciary financial planning and investment advisory firm based in Miami, Florida. Treece Financial Group takes a holistic approach to planning, and is dedicated to all aspects of a client's financial health, and not just managing investments. Treece has 30 years of financial planning experience. **Treece Financial Group** manages tens of millions of dollars in assets at any given time. Treece has been featured in *The Miami Herald*, *Sun-Sentinel*, PBS's *Nightly Business Report*, *The Washington Post*, and on NBC6 in an Emmy-award winning series about his work.

*The Miami Herald*

SOUTH FLORIDA  
**SunSentinel**

*The Washington Post*

A woman with her hair in a bun, wearing a white button-down shirt, is sitting on a couch with orange pillows. She is smiling broadly with her arms raised in a celebratory gesture, looking at a laptop in front of her. The background shows a bright window with a view of a city.

## FiscaleFit

Treece Financial Group proudly announces the launch of an exciting new program, **FiscaleFit™**, for younger professionals. **FiscaleFit™** is a fee-for-service membership program that is a solution to the clear gaps in the financial services industry.



## What is FiscaleFit™?

Many young professionals, often referred to as “Henry’s” (high earning, not rich yet), are not being served by the financial services industry because they do not have enough assets to meet the minimums of most firms. These young professionals are also wary of the traditional industry because of fees, lack of personal attention, and low trust. Many want more control, but they still want a trusted financial professional as a coach. FiscaleFit™ is a breakthrough, comprehensive custom program that meets their needs.

FiscaleFit™ is an innovative fee-for-service tool bundle that Treece Financial Group (TFG) administers. By registering for the one-year, free trial at [www.treecefinancialgroup.com](http://www.treecefinancialgroup.com), clients get access to the **same brand name financial planning and investment tools, software, and databases that are usually only affordable to high net worth clients**. Through FiscaleFit™, these tools are now available to everyone because unlike its competitors, **TFG does not require assets under management or a minimum balance to use them**. This revolutionary, new program also includes personalized coaching utilizing David Treece’s 30 years of financial investment experience.

## Who should use FiscaleFit™?

FiscaleFit’s™ customers are generally 30 to 49-year-olds who are employed and are high earners, or have their own businesses. They are learning-oriented and want to become CFOs of their own investments to reduce fees, avoid conflicts of interest, and directly control their assets.

**Normally, the entire package would cost over \$9,000 annually, without counting an advisor’s fees.**

## FiscaleFit™ Pricing

**With \$9,000 in investment tools, FiscaleFit™ is free for 1 year from sign-up.** Once the year is up, FiscaleFit™ subscribers pay \$25 a month to continue leveraging the best investment tools in the business, with the ability to cancel at any time. Clients pay through AdvicePay, under the auspices of Cetera Advisors, so it is fully regulated and compliant.

### What you get in FiscaleFit™:

**AdviceWorks:** A financial platform where a member can store all their credit cards, account information and downloadable files in one place

**Everplans:** Your own personalized dashboard to create your personal plan with “To Do Lists,” checklists, and guidance broken out in sections: “My Life”, “Health, Medical”, “Financial”, “Legal”, “Eldercare”, and “After I’m Gone”

**MoneyGuidePro:** What the professionals use to build financial plans

**401(k) Optimizer:** Web-based tool designed to help you manage your company-sponsored retirement plan while keeping your assets within the plan

**Financial Library:** A large and growing number of articles, short educational videos, planning guides, blog posts, and webinars, etc., and invitations to live webinars on timely topics

## Upgrade to FiscaleFit™ Go Pro

To get a more comprehensive approach to investing and retirement, there is FiscaleFit™ Go Pro, which also includes all the tools in FiscaleFit™.

FiscaleFit™ Go Pro is priced at only \$150 a month\*\*. Payment is made through AdvicePay\*\*\*\*, included in your software tools bundle, and can be cancelled at any time.

### What you get in FiscaleFit™ Go Pro:

#### **Your Portfolio Snapshot using Morningstar:**

Analysis of your holdings including risk vs. reward breakdown

#### **Retirement Analyzer Income Planning Software:**

Projections of your savings and investments to get you on the road to retirement

**Social Security Calculator Report:** Analysis of Social Security profile to maximize benefits

#### **20 VectorVest Stock Reports per Quarter\*\*\* :**

Stock review and portfolio management system that analyzes, ranks and graphs over 19,000 stocks each day for value with clear buy, sell or hold rating

**20 Morningstar Reports per Quarter\*\*\*:** The financial industry's lead independent research on mutual funds and exchange-traded funds

**Quarterly Personalized Ongoing Financial Coaching:** 1-hour free consultation per quarter from one-of-two top financial advisors, at Top-Rated Treece Financial Group, to prepare personalized financial plans and reports for you\*

\* Additional consulting hours are at a discounted cost of \$150 per hour

\*\* FiscaleFit™ Go Pro membership fee is only \$150 per month, with the first quarter (3 months) payable upfront

\*\*\* Not cumulative

\*\*\*\* Clients pay through AdvicePay, under the auspices of Cetera Advisors, so it is fully regulated and compliant

For more information on Treece Financial Group, FiscaleFit™ or interviewing David Treece as a Financial expert email:

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