Choose The Plan That Works Best For You

We know that there's no one-size-fits-all financial plan so we offer options to help you get the help you need without overpaying for things you don't!

Service	Foundations	Stewardship	Hourly
Access to Mobile App	●	●	●
1-Page Financial Plan	●	●	●
Investment Advice	Up to 3 Accounts (Pre-tax/Roth only)	Up to 5 Accounts (1 Taxable Brokerage)	You define the scope of services. Contact us to receive an estimate.
Meeting frequency	Semi-annual	Quarterly	
Email/Phone Inquiries	8/yr	Unlimited	
Cash Flow/Budgeting	●	●	
Retirement Planning	Basic	Advanced	
Social Security Optimization		●	
College Planning[1]		●	
Cost (Initial/Quarterly)[2]	$350/$225	$450/$500	$250/hr

[1] College planning can be added on to Foundations package for an additional $40/mo. [2] Quarterly costs represent 1/4 of flat annual fee. Initial fee due at service inception. Ongoing fees will be billed quarterly, in arrears.

Investment advisory services provided by Transform Retirement, LLC, a registered investment adviser. All investments carry risk of loss. Nothing herein should be construed as a guarantee of any positive financial outcome.

Lifestage Planning Options Make Excellent Gifts

Change is hard on finances. Give your loved one the extra help that they need to manage life changes well. Each package is available for only $500!

New Addition

We'll help the expectant parents review and adjust their budget for their growing household, adjust financial priorities, review employee benefit options, college savings, insurance needs and more.

Tying the Knot

We'll help the couple review merged assets, coordinate benefits, manage debt, prepare for income tax surprises and review beneficiary designations to make sure the couple starts their marriage on solid financial footing.

On Your Own

We'll meet with the newly independent graduate and review financial priorities, budgeting, retirement saving, employee benefits and more to help him/her start their financial life on the right path.

Each option includes 2-one hour financial planning consultations, a 1-page financial plan and a review of current investments!

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