



Included Services Overview

Foundational
Financial Planning

Comprehensive
Financial Planning

Personal
Finance CEO

Financial Planning

A Comprehensive Plan for All Your Goals	✓	✓	✓
Live Meetings	Annual	Semi-Annual	3 Times Yearly
Check-ins	Mid-Year	✓	✓
Personal Finance Questions Answered Throughout the Year	✓	✓	✓
Direct Coordination (phone, email, video) with your other professionals	✗	✓ Limited	✓
Live Advisor Meeting Attendance with Other Professionals	✗	✗	✓

Tax Planning

Tax Strategies	✓	✓	✓
Tax Preparation	Available for an additional fee	Basic Personal Included	Basic Personal + Additional Schedules Included

Estate Planning

Estate Plan Review, Guidance, & Education	✓	✓	✓
Estate Planning Document Preparation	Available for an additional fee	Included with our online service partner. Equal credit available for local attorney.	Included with our online service partner. Equal credit available for local attorney.
Estate Planning Attorney Support	Available for an additional fee	Available for an additional fee	Included with our online service partner. Equal credit available for local attorney.
Asset Protection Strategies	✓	✓	✓

Insurance Planning & Risk Management

Risk Reduction Strategies	✓	✓	✓
Insurance Review & Recommendations	✓	✓	✓
White-Glove Insurance Quote Sourcing & Comparison	✗	✗	✓

Investment Planning

Investment Management	✓	✓	✓
Self-managed account review (401(k), 403(b), TSP, etc.)	Annual	Semi-Annual	Proactive
Customized Portfolios	✗	✓	✓
Individual Fixed Income Portfolios	✗	✗	✓
Real Estate Strategies (1031 DST Exchange, 721 UPREIT, QOZ)	✗	✗	✓
Access to Private Equity Investments (Pre-IPO Companies)	✗	✗	✓
Monthly Cost of Service	\$295 Individuals \$395 Couples	\$500-\$1,000	\$1,000-\$2,000