

## **GUIDE TO SERVICES**

### **PLANNING FOR FINANCIAL LIFE STAGES**

#### **STARTING OUT**

Education in financial principles, understanding taxes and cash flow.

#### **MID LIFE**

Handling increased financial responsibility (home upgrades, education for children, job changes and business start-ups)

#### **PRE-RETIREMENT**

Assessing expense priorities, aligning resources for income production and tax minimization.

#### **EARLY RETIREMENT**

Construct cash flow bridges by effectively deploying resources until normal retirement age

#### **FULL RETIREMENT**

Monitoring financial strategies  
for a life well planned

### **PERSON TO PERSON PARTNERSHIP RESOURCES**

- Monetary and Economic Education
- Financial Confidant to your family
- Collaborate with Professionals to support your plan
- Small Business Consultation and Services

### **COSTS OF ENGAGEMENT**

As fiduciaries we are bound to provide you the most cost effective methodology with which to interact with our practice. Therefore, we are not limited in the manner in which to price our services. We can provide hourly consultation, project-based arrangements, asset-based pricing, or a traditional transaction-based model. Our objective is to establish and maintain a mutually beneficial long-term relationship. Our sources of compensation include:

- Implementation (enacting the plan via a transaction-based or fee-based arrangement)

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