



Financial Planning Service Calendar

Meet with Dan Andrews, CFP® each month to organize your Financial Life!

Financial Planning Program

Work with a CERTIFIED FINANCIAL PLANNER™ to build your Personal Financial Foundation so you can address your responsibilities with confidence!

AKA: Financial “Adulting” Help!

Month 1
Paperwork Organization

Month 2
Personal Financial Summary

Month 3
Budgeting

Month 4
Insurance

Month 5
Credit Score & Debt

Month 6
Work Benefits & Retirement

Month 7
Investments

Month 8
Will & Estate Planning

Month 9
Tax Guidance

Month 10
Money Personality

Month 11
Create Money Goals

Month 12
Annual Review

\$800 Initiation Fee + \$150 Per Month



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