



Combo Service Program

No training manual explains the challenges of navigating early adulthood. That's why this program exists. We guide and encourage young professionals in Financial Literacy and Personal Growth.

Financial Literacy Track

Financial Literacy education from a CERTIFIED FINANCIAL PLANNER™ to help analyze your current situation. We also enjoy holding clients accountable to adopt positive money habits while we navigate this overwhelming field for new adults.

Personal Growth Track

Many challenges exist for today's young people. Through our exercises, our participants feel more comfortable about their unique selves as a person and as a professional. We address multiple personal and professional growth topics to inspire our clients to thrive as an individual.

<u>Month 1</u>	<u>Month 2</u>	<u>Month 3</u>	<u>Month 4</u>
Paperwork Organization	Your Financial Summary	Budgeting & Online Banking	Insurance
Gratitude Project	Goals & Rewards	Career Skills Assessment	Mission & Vision
<u>Month 5</u>	<u>Month 6</u>	<u>Month 7</u>	<u>Month 8</u>
Credit Score & Debt Strategies	Work Benefits & Retirement	Investments	Will & Estate Planning
Strengths & Personal Brand	Professional Documents	Time Management	Target Mood Distribution
<u>Month 9</u>	<u>Month 10</u>	<u>Month 11</u>	<u>Month 12</u>
Tax Guidance	Money Personality	Philanthropy & Volunteering	Annual Review
Networking & Relationships	Track Happiness & Achievements	Interview Opportunity Creators	Annual Review

\$1,000 Initiation Fee + \$250 Per Month



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