



# Investment Management Service Outline

Embrace technology, keep your costs low, & gain a go-to resource for financial guidance!

Work with a CERTIFIED FINANCIAL PLANNER™ to help you translate all the investment jargon and gain confidence in the investment world!

Services Include:

- Low-Cost Passive Investment Strategies
- Automatic Rebalancing
- No Transaction Costs
- Quarterly Emails From Dan Andrews, CFP®

**Investment Management With**



**Gain A Go-To Resource For Personal Finance Questions**

Bedrock	Community	Career	Relationships	Soul
- Budgeting	- Taxes	- Career Development	- Beneficiaries	- Fun Money
- Emergency Savings	- Charitable Giving	- Income Planning	- POD & TOD	- Psychology With Money
- Insurance	- Philanthropic Efforts	- Side Hustles	- College Savings	- Vacations
- Health Savings	- Estate Planning	- Employee(r) Benefits	- Life Insurance	- Hobbies
- Retirement Planning		- Continuing Education	- Advanced Directives	- Financial Goals
- Investments		- Investing In Yourself	- Will	- Life Stages
- Credit Score		- Professional Documents	- Aging Loved Ones	- Behavioral Finance
- Student Loans & Debt			- Legacy Planning	
- Automatic Saving				

## 0.85% of Money Managed Per Year



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