



Well-Rounded Financial Planning Service Calendar

No training manual explains the challenges of navigating adulthood. That's why this program exists. We guide and encourage clients in this Financial Planning Program.

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.

Financial Planning Program

Month 1
Paperwork Organization

Month 2
Personal Financial Summary

Month 3
Budgeting & Online Banking

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
Philanthropy & Volunteering

Month 12
Annual Review

\$800 Initiation Fee + \$150 Per Month



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