



# Well-Rounded Financial Planning® Service Calendar

No training manual explains the challenges of navigating all of your Life Administration. That's why this program exists.

## Financial Planning Program

Money education from a CERTIFIED FINANCIAL PLANNER™ to analyze your current situation. You'll also be held accountable to adopt positive money habits while navigating overwhelming subjects. Here's a list of potential topics to address. You can expect to get a unique program tailored towards your needs.

**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**  
Education  
Planning

**Month 10**  
Money  
Personality

**Month 11**  
Philanthropy &  
Volunteering

**Month 12**  
Annual Review

**\$1,500 Initiation Fee + \$250 Per Month**



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