

PLUMTREE ANNUAL PLAN

COMPREHENSIVE FINANCIAL PLANNING WITH ONGOING SUPPORT

PlumTree was designed to provide a different type of financial planning – We specialize in helping young professionals and their families make smart financial decisions and build plans to reach their goals.

YOUR GOALS, YOUR PLAN

Our work together is collaborative. We start by creating an initial plan that showcases where you are now financially, and also your goals and vision for your life. We then work together systematically to implement the action steps and get you closer to your goals. As changes happen in your life, we adapt your strategy to meet your new situation and vision of financial success. Once a year we do a thorough review of the plan to ensure you are on-track to your goals.

Every plan we build is unique, delivered after fully reviewing your current situation and learning your financial goals. We take a disciplined, process driven approach focusing on the things you can control while managing the risks of the things you cannot.

FIRST YEAR STRUCTURE

The first year starts with an initial-planning process over 3 meetings, a 3-month follow-up meeting, and an additional 1-2 meetings based on what we discover during our initial planning.

FOLLOWING YEARS

Subsequent years kick off with an Annual Renewal Meeting, and 1-2 additional meetings throughout the year.

ALL YEARS INCLUDE

- A written Financial Planning Summary that lays out goals, strategies, and action items.
- Access to our 360° partner network of professionals that help you get to the next level.
- Unlimited access (via email, phone, and meetings).
- Secure, simple, online access to all your information.

Comprehensive Planning - \$3,000 per year

We meet a new challenge every day. Bring us yours.

Visit us today at www.plumtreefp.com