



PLUMTREE PROJECT PLANNING

ONE-TIME COMPREHENSIVE FINANCIAL PLAN

Once you have a plan you can spend time focusing on what's most important in your life.

ANSWERS TO YOUR QUESTIONS

Over the course of 3 meetings, , we'll have in-depth discussions on pertinent financial topics to help us understand what is important to you and what you'd like to accomplish.

DISCOVERY MEETING

Your initial review will cover everyday spending, debt management, income taxes, education planning, retirement planning, investment management, estate planning, legacy building, and anything that is important to you. At this meeting we'll aim to fully understand your goals and what you consider "success."

PLAN DELIVERY MEETING

After taking a holistic look at your finances, we'll work together to construct a personalized, comprehensive financial plan that will be delivered in the second meeting, the Plan Delivery Meeting. This plan will review all important aspects of your financial life, highlighting where you are now, where you want to go, and fully customized advice to reach your goals. The plan also provides a list of specific, narrowly defined steps to get you to that future.

2-WEEK FOLLOW-UP MEETING

The third meeting is a 2-Week Follow-up Meeting which is generally done by phone and is designed to help gauge your progress and help overcome any roadblocks you may have encountered.

Project Planning - \$250 per hour
(most project-based engagements run from 7 to 12 hours)

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

Visit us today at www.plumtreefp.com