



# FINANCIAL PLANNING OVERVIEW

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*Get support from someone who understands how to deliver great financial planning advice*

With our Financial Planning and Para-Planning Services, you can leverage our in-house CERTIFIED FINANCIAL PLANNER™ and Para-Planner to serve your clientele, and possibly create a new revenue stream within your current business.

We offer a flexible service suited to your needs and your clients. From the very detailed to the very straight forward, our professionals can act as an extension of your team!

## Financial Planning

Advisor Coaching

Virtual or In-Person Meetings

Advanced Case Design

Joint Appointments with Clients in a Consultant Capacity

## Para-Planning

Data Collection

Data Entry into Financial Plan

Reports or Creation of a Custom Financial Plan utilizing eMoney or MoneyGuidePro

**For more information contact Cyndy Kocher, CFP®  
at (360) 866-2345, ext. 460 or via email at [planning@financialadvocates.com](mailto:planning@financialadvocates.com)**

# THE BENEFITS OF OUTSOURCING FINANCIAL PLANNING AND PARA-PLANNING



The typical time to create a comprehensive financial plan is about 5 hours. This takes you away from serving your other clients, prospects, or doing other revenue generating activity.



Financial plans can create multiple revenue streams such as: advisory revenues, life insurance sales, long-term care sales, disability insurance sales, annuities, and other commissionable products.



Our experienced para-planner eliminates your need to hire a full-time employee, saving you time and money.

## ABOUT CYNDY KOCHER, CFP®

Cyndy is an experienced and skilled professional with over 20 years experience in the financial services industry on top of 16 years of diverse business experience.

She enjoys working with individual financial advisors to develop customized strategies for their clients' distinct goals and circumstances.

Cyndy is passionate about keeping on top of national and international economic trends that may benefit her clients. With over 11 years overseas living experience, an undergraduate degree in Asian Studies and her first MBA in International Management, Cyndy is qualified and prepared for understanding our complex world.

She also holds an MBA in Financial Planning in addition to the CERTIFIED FINANCIAL PLANNER™ (CFP®) designations.



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