

# FINANCIAL PLANNING

GENERATE A NEW INCOME  
SOURCE OR EXPAND YOUR  
EXISTING SERVICES



With our Financial Planning and Para-Planning Services, you can leverage our in-house **CERTIFIED FINANCIAL PLANNER™** and Para-Planner to serve your clientele or 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!

## WHAT TO EXPECT



Superior financial planning assistance



Personalized approach based on each plan's goals



No need to hire a full or part-time employee



Exceptional client experience for the end investor

## OUR SERVICES

- ✓ Advisor coaching
- ✓ Virtual or in-person meetings
- ✓ Advanced case design
- ✓ Joint appointments with clients
- ✓ Data collection
- ✓ Data entry into financial plan
- ✓ Reports and creation of custom financial plans using eMoney or MoneyGuidePro



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