

## CHOOSE A PLAN THAT WORKS BEST FOR YOU



One Session	3 Months of Sessions	6 Months of Sessions	One-year check-in
	<b>MOST POPULAR</b>	Best value per hour	
Best if you have a few questions and are seeking unbiased answers.	Can address several money related challenges. Cost effective if you are willing to work hard in short period of time.	For complex and many monetary challenges. Best if you have scheduling challenges and want to work more slowly.	Either to maintain what you've learned or need a partner to keep you on target. Great value
<i>Reasons to meet: Review your budget and offer suggestions  Second opinion on your investment portfolio  Review life insurance policies.</i>	<i>Works well with anyone who wants to quickly address their issues and get their plan underway.</i>	<i>For those that have busier and more complex lives, such as:  Family with kids  Frequently traveling for work or other time commitments</i>	<i>Great if you need a partner to keep you motivated.</i>
Up to 90 minutes	First appointment is up to 90 minutes. Remaining 2 hours can be either 60-minute or 30-minute sessions.	First appointment is up to 90 minutes. Remaining 5 hours can be either 60-minute or 30-minute sessions.	Includes: 15-minute monthly check in via phone or video. Unlimited emails.
Summary email after the meeting is included.	Summary email after each session along with specific assignments is included.	Summary email after each session along with specific assignments is included.	
Your investment: \$295	Your prepaid investment: \$795	Your prepaid investment: \$1395	Your prepaid investment: \$600*
			*Must be a former client Or purchase one session at \$295 (total investment of \$895)
	<b>Bonus</b> Commit to meet every other week; Receive one extra 30-minute session as a bonus.	<b>Bonus</b> Commit to meet every other week; Receive two extra 30-minute sessions as a bonus.	
	Cancelling two meetings in a row with less than 24-hour notice will result in the loss of a half-hour session.	Cancelling two meetings in a row with less than 24-hour notice will result in the loss of a half-hour session.	Length of time is for only one year. Missing a month due to the client being unavailable means they forfeit that month's check in.