

Advice-Only Financial Planning

For those who prefer to manage their own investments, or whose asset structure may not align with an ongoing advisory engagement, we offer comprehensive advice-only planning services. These go beyond a one-time plan in that each engagement includes a follow-up meeting, year-round access to your plan through eMoney Advisor, and limited email correspondence throughout the year.

Engagements are limited to one-year.

Service	Gold	Silver	Bronze
Fee	\$5,200	\$3,600	\$1,800
Portfolio Management			
Portfolio Review	✓	✓	✓
Equity Compensation (RSUs, ISOs, NSOs)	✓	✓	—
Concentrated Stock Evaluation	✓	—	—
Tax Planning			
Capital Gains Management	✓	✓	✓
Roth Conversion Review	✓	✓	—
Tax-Efficient Withdrawal Planning	✓	—	—
Tax Return Analysis (Holistiplan)	✓	—	—
Charitable / Donor-Advised Funds	✓	—	—
Financial Planning			
eMoney Financial Planning Software Access	✓	✓	✓
Debt Review	✓	✓	✓
Cash Flow Analysis	✓	✓	—
Retirement Planning Forecasts	✓	✓	—
Education & Legacy Savings Review	✓	✓	—
Real Estate Spending Review	✓	—	—
Risk Management			
Life Insurance Review	✓	✓	✓
Disability Insurance Review	✓	✓	—
Liability Insurance Review	✓	✓	—
Long-Term Care Insurance Review	✓	—	—
Estate Planning			

Service	Gold	Silver	Bronze
Beneficiary Review	✓	✓	✓
Estate Document Review	✓	—	—
Engagement Structure			
Initial Meeting	2-hour block	1.5-hour block	1-hour block
Follow-Up Meeting (1 year after plan)	2-hour block	1-hour block	30-minute block
Email Correspondence (12 months)	Limited	Limited	Not included

Important Note: We do not provide tax or legal advice. We coordinate with your CPA and estate attorney as needed. As fee only advisors, we do not write insurance policies. Pricing is as of 2026 and is subject to future change. Advice only engagements are limited and may be rejected based on capacity and fit.

