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FINANCIAL GROUP

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*Technology + Financial Coaching
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The next generation of financial services is here. Advice Pay gives you direct access to the latest cutting-edge technology, paired with coaching from a financial professional. Choose the subscription package best for you and pay monthly via credit card or ACH, just like subscribing to your favorite streaming service.

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PACKAGE BENEFITS	GOLD SUBSCRIPTION	PLATINUM SUBSCRIPTION
Ongoing coaching meetings with financial professional*	✓ Annual	✓ Quarterly
Investment Review	✓	✓
Employee Retirement Plan Review	✓	✓
Retirement Check-Up	✓	✓
Goal Monitoring*	✓	✓
Behavioral Financial Coaching*	✓	✓
Budgeting	✓	✓
Online Financial Portal*	✓	✓
Cash Flow Analysis	✓	✓
Net Worth Statement	✓	✓
Retirement Income Planning	✓	✓
Roth Conversion Review		✓
Stock Option Analysis		✓
Multiple Goal Analysis		✓
Risk Analysis		✓
Wealth Transfer Planning		✓
Charitable Giving Strategies		✓
Small Business Planning		✓
Collaboration With Third-Party Professionals (e.g., attorney, CPA, etc.)		✓
	Plan Only: \$500 Ongoing Coaching: \$99/month	Plan Only: \$2000 Ongoing Coaching: \$250/month

To learn more or to subscribe to Advice Pay, contact Chris Marshall, AIF®, Wealth Advisor

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*Not included in Plan Only option.

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