David Anderson
FINANCIAL PLANNING, LLC
Realize Financial Freedom

Get-Acquainted Meeting — **Complimentary**

- A 30-45 minute session to discuss your financial situation, your needs and your goals in the context of our financial planning services.
- At the conclusion of the meeting we will submit to you an estimated fee for providing financial planning services.

3 Hour Topical Financial Review — **$400 Project Fee**

- Following the Get-Acquainted Meeting, this engagement is split into two parts:
    - Two hours of analysis and preparation of recommendations by the planner;
    - A one hour session with the client to review the recommendations.
- Potential topics include retirement needs analysis, asset allocation, 401(k) plan investment choices, and college planning.

Comprehensive Financial Plan — **Engagement Fees beginning at $900**

- Following the Get-Acquainted Meeting this engagement is split into three parts:
    - A session with the client to set goals and gather data
    - Analysis by the planner and preparation of Recommendations and Action Plan
    - A session with the client to review Recommendations and Action Plan
- Areas covered are cash flow, debt management, education planning, retirement planning, investment planning, insurance planning as well as a basic overview of estate planning.
- Fee will vary with complexity of the engagement and will be based on amount of time actually spent with a maximum agreed upon at the Get-Acquainted Meeting.

Annual Retainer *for* Financial Advice and Coaching — **$2,400 annually**

- Quarterly investment analysis
- Quarterly coaching session to review investment analysis as well as obtain advice on retirement planning, budgeting, college savings and other topics
- Each quarterly session is scheduled for 90 minutes
- Email and phone access at other times

Hourly Consultation — **$150 per hour**

Fee schedule may be modified from time to time. Client's actual fees are determined at time of contract signing.

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