

Financial Planning Fees & Services

	Consultation \$30/month	Guidance \$100/month	Advisory \$200/month	Private Client \$400/month
Ideal For				
20s - 30s Early Accumulation	✓	✓		
40s - 50s Wealth Building	✓	✓	✓	✓
60s - 70s+ Financial Independence		✓	✓	✓
Business Owners			✓	✓
Financial Services				
Financial & Lifestyle Goals	✓	✓	✓	✓
Net Worth Statement	✓	✓	✓	✓
Action Item Summary	✓	✓	✓	✓
Risk Management Analysis	✓	✓	✓	✓
Retirement Planning		✓	✓	✓
Decision Support		✓	✓	✓
Wealth Planning (estate, legacy)			✓	✓
Private Banking and Trust Services				✓
Financial Tools				
Online Portal & Account Aggregation	✓	✓	✓	✓
Budgeting & Spending Trends	✓	✓	✓	✓
Portfolio Risk Analysis & Stress Testing	✓	✓	✓	✓
Debt Reduction Strategies	✓	✓	✓	✓
Financial Planning	✓	✓	✓	✓
Estate Organization			✓	✓
Business Valuation Report				✓
Ongoing Services				
Goal Progress Check-ins	1 per year	1 per year	2 per year	4 per year
Meeting Format	phone/virtual	office	client choice	client choice
Financial Advisory Team	✓	✓	✓	✓
Dedicated Financial Advisor		✓	✓	✓
Access to Specialists			✓	✓
Coordination with other Professionals			✓	✓
Concierge Services (for Hummel Group)				✓
Profile Access	Advisor Team	Advisor Team	Advisor Team	Advisors Only
Special Projects			Consult Advisor	Consult Advisor