	GET ME STARTED	GET ME ORGANIZED	HOLD MY HAND
This is For Those That...	Need a push to get started on their financial journey and is comfortable working on their own.	Want to start their financial journey and create a plan for the future.	Want more assistance and accountability with financial journey and create a solid plan for the future.
	■ Discover your current cash flow and budget situation so you can start your financial journey on solid footing	■ Discover your current financial situation ■ Develop a financial roadmap ■ Receive ongoing assistance and accountability	■ Discover your current financial situation ■ Create and execute a financial roadmap ■ Receive hands-on assistance to help you reach your financial goals
First Six Months			
Initial Meetings	Two 1-hour consultations	Two 1-hour consultations	Two 1-hour consultations
Topics	Budget, cash flows, and objectives.	An in-depth review of financial situation and life objectives.	An in-depth review of financial situation, life objectives, and finding a structure that works.
New Client Review		One 90-minute review	One 90-minute review
Financial Planning Software	Unlimited	Unlimited	Unlimited
Additional Services			
Financial Plan	Baseline	Comprehensive	Comprehensive
Annual Review			60-minute review
Quarterly Phone Review		✓	✓
As-Needed Meetings		✓	✓
Access	Email	Phone, Email	Phone, Email
Financial Planning Fees			
	$69/month	$169/month	Priced Based On Needs

Financial planning fees are cut by 50% for assets over $100,000, and are included for all clients with assets over $250,000.

Investment Management Fee Schedule

1% on first $500,000 | .95% on next $500,000 | .85% on assets over $1mm

Please ask us for more details.

Additional fees may apply for program fees that are not included in these prices charged by Cambridge Investment Research Advisors, Inc.