Comprehensive Financial Planning

Earn Into Wealth Strategies specializes in helping young professionals improve their personal finances. Our mission is to help our clients to live the life they want, achieve their personal goals, and ultimately secure financial freedom.

How can we help you?

Comprehensive Financial Planning

A service designed for busy people who have a variety of financial concerns and would like to start proactively planning for their financial future. You desire to work with a tech-savvy planner who stays current on the financial strategies that meet your needs.

You Will Receive:

- A financial plan with a roadmap that includes a net worth statement, debt payoff plan, and savings projections
- The plan includes recommendations in the following areas: cash-flow, insurance, debt repayment, investments, tax planning, retirement planning, and estate planning
- Recommendations on products and services that fit your financial needs
- Access to a network of resources and other professionals such as CPA's, insurance agents, and estate planning attorneys

What's Included?

- 3 to 4 initial meetings in-person (NYC office) or via video conference to build and deliver personalized financial plan
- Assistance & guidance in implementing the financial plan
- 2 to 3 official meetings annually for coaching and progress-check sessions
- Update, monitor, and modify your plan as needed
- Unlimited email or phone support for questions that arise throughout

The Financial Plan Components

Here are some brief examples of what your comprehensive financial plan might address:

Cash Flow & Budgeting

- Are you spending less than you earn and able to set money aside for your goals?
- How can you shift around your expenses so you can fund the things that matter most?

Income Planning

- How can you make enough to support your goals?

Tax Planning/Employee Benefits

- How can you keep more of what you earn and minimize unnecessary taxes?

Debt Management

- How quickly can you become debt-free?
- Which debts to pay-off, refinance, or de-prioritize?

Investments/Retirement/Education

- Should you be investing now, in what assets, and how much?
- Does your investment strategy match your goals, time-frame, and risk tolerance?

Risk Management (Protection)

- Are you and your assets adequately protected against negative events?

Estate Planning

- Do you have a plan for when you are unable to make decisions for yourself or loved ones?

Service Option 1

We aim to make high-quality financial advisory services accessible to early to mid-career clients regardless of how much they have to invest. We have adopted an income-sensitive approach to accomplish this.

Earn Into Wealth Strategies is a fee-only financial planning firm:

- No conflicts of interest, no commissions, sales charges, or referral fees from anyone or products
- Our priority is whatever is in your best interest, we act as a fiduciary and put your needs first
- Our revenue is only what (you) our clients pay us
- Our aim is to be your trusted financial advisor for as long as you want

Comprehensive Financial Planning Fees are $750 - $1000 upfront, followed by a monthly on-going planning fee of $300 - $475.

Are you ready to take bold steps towards achieving your life goals?

Contact Us Today!

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