

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

Foundations of Wealth Program™

Individuals: One-Time Fee \$500 + Annual Fee, paid monthly (starting at \$200/mo.)

Couples: One-Time Fee \$750 + Annual Fee, paid monthly (starting at \$300/mo.)

“Your entire financial house sits on your cash-flow foundation”

This Package is designed to help our clients build a solid foundation upon which their long-term wealth will be based. Converting earned income into lasting wealth is no easy feat and requires tremendous discipline and smart planning. While cash-flow planning, debt management, and establishing an emergency fund might seem trivial, they comprise the bedrock of a great financial plan.

Who Might Benefit From This Package:

This package might be ideal for “beginners” to financial planning, those without dependents, those feeling overwhelmed by their expenses and/or debt, or those who aren’t currently able to invest outside of their employer retirement plans.

Topics Addressed Include:

- Your Financial Goals
- Cash Flow & Savings Strategy for different goals
- Work Place Benefits (includes retirement plans such as 401k & similar)
- Debt (Student Loans, Credit Cards, etc.) & Credit Profile
- Income Protection (Disability Income Insurance)

You Will Receive:

- A mini financial plan with a roadmap that includes a net-worth statement, spending plan, debt payoff and savings strategies
- Online access to customized tools to view your plan and manage your finances

What’s Included?

- 2-3 initial meetings to build and deliver your personalized financial roadmap
- After the initial planning phase, 1-2 official meetings per year for coaching + progress check-ins
- Implementation support & guidance is provided throughout the year
- Consider your advisor “on-call” to guide you through life changes (new jobs, new cities, new relationships....)

**The Foundations of Wealth Program also includes in-depth asset allocation, risk profiling, or investment planning for all investment accounts if applicable.

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