Full Financial Review

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.

Complete Financial Review Package

This is a one-time financial planning engagement to examine the state of your finances relative to your goals. You will receive a full assessment of all areas as well as recommendations for addressing gaps to get you on track. This package is ideal for High-Income Do-It-Yourselfers or people who are more established in their careers and want an objective second opinion. Topics addressed may include: cash flow, risk protection (insurance), retirement, investments, taxes, debt, education, and estates.

Flat Fees: $3000+ (Individuals), $4000+ (Couples), $5000+ (Business Owners)

Client's who wish to convert to on-going planning within 3 months can apply the full amount of the financial review fee.

Financial Review Process:

Duration: About 3 meetings with a completion goal of 4 to 6 weeks. Timeframe can be shorter or longer depending on client availability and responsiveness.

1. **Discovery Meeting & Data-Gathering**
   - You will receive a list of information needed as well as access instructions to upload and link requested data
   - Schedule 1.5 to 2 hours with advisor to discuss your goals and also receive a navigational overview of our planning tools
2. **Goals & Data Validation Meeting**
   - Once all your financial information has been received, advisor will begin to review and prep questions for goals & data validation meeting
   - Schedule 1.5 to 2 hours with advisor to review refined goals, observations, and data
3. **Plan Delivery Meeting**
   - Advisor will analyze your situation and prepare recommendations that will be delivered in this final meeting
   - Schedule 1.5 to 2 hours to discuss your full financial review recommendations & decide on your action steps

*Clients doing this one-time engagement will have online access to their financial plan and recommendations online for a period of 3-months. This information can also be downloaded and saved at any point during that period. An additional surcharge may apply to address topics beyond average complexity such as trust accounts, deferred compensation plans, employee stock options, and other complex financial situations.

Kaya Ladejobi | www.earnintowealth.com | kaya@earnintowealth.com | 646.494.6220