



PERSONAL BUNDLE

EASY MONTHLY FEE

Everything you need to reach your goals faster.

1. CASH FLOW SUCCESS PLANNING

A strategic plan for your personal cashflow & active support so you can make your cash flow goals a reality.

3. WITHHOLDING ANALYSIS

Review of your tax withholding to make sure you're aligned with your other goals and protecting against any bad surprises.

5. PROACTIVE TAX PLANNING

Ongoing review of your tax situation so you'll know you're paying the least possible tax & can invest your income in other ways.

7. IRS CORRESPONDENCE ASSISTANCE

Never fear correspondence from the IRS, State, or local agencies. We'll tell you what it means & exactly what needs to be done to address it.

2. NET WORTH ANALYSIS

Gain power from knowing the exact picture of your current financial health. Know where you are & track your progress.

4. PERSONAL FINANCIAL REVIEW

Know all the critical areas of your financial life are covered, plus guidance & help if anything is missing.

6. PREPARATION & FILING OF YOUR RETURN

Your state & federal return will be taken care of in the best possible way, by our experienced professionals.

8. YEAR-ROUND ACCESS TO YOUR TEAM

Year-round access to your personal financial advocate. We fight in your corner with knowledge & data you won't find anywhere else!

