

Whelan

Financial Planning

	FEES		
	\$2,000 - \$2,750	\$3,000 - \$3,750	\$4,000 - \$5,000
GOALS			
Retirement Projection	X	X	X
Other Goals		X	more than 2
CASH FLOW	X	X	X
INVESTMENTS			
401(k), 403(b), 457 & IRA	X	X	X
Taxable Accounts	1 account	2 – 3 accounts	4 or more accounts
Variable Annuities		1 annuity	More than 1 annuity
Education Savings		X	X
RETIREMENT INCOME PLANNING			
Social Security Timing	X	X	X
Pension decisions		X	X
IRA withdrawal planning		X	X
TAX PLANNING			
Withholding / Estimated Tax	X	X	X
Roth Conversions		X	X
INSURANCE ANALYSIS			
Life Insurance	1 policy	2 or more policies	2 or more policies
Long Term Care		X	X
Disability		X	X
ESTATE OVERVIEW			
Beneficiary Review	X	X	X
Prepare for estate planning attorney		X	X
Assets greater than \$5.0 million			X
1 year subscription to online financial management system		X	X

Updates			
Update scheduled within 12 months	\$750	\$1,000	\$1,250
Update scheduled within 18 months	\$1,000	\$1,250	\$1,500
Update scheduled within 24 months	\$1,250	\$1,500	\$1,750
Update scheduled after 24 months	Treated as new client		