



## THE GOODLAND GROUP

# INITIAL PLANNING

	<b>CORE</b> \$1,750 + \$375/mo	<b>CORE+</b> \$2,500 + \$475/mo
<b>Meeting 1</b>	Values Budget/Cash Flow Net Worth Goal Priorities	Values Budget/Cash Flow Net Worth Goal Priorities
<b>Meeting 2</b>	Emergency Fund Debt Strategy College Calcs Retirement Calcs Other Goal Calcs Equity Comp or Business Review	Emergency Fund Debt Strategy College Calcs Retirement Calcs Other Goal Calcs
<b>Meeting 3</b>	Investment Review & Strategy Account Optimization Employee Benefits Life Insurance Disability Insurance Estate Planning Action List	Investment Review & Strategy Equity Comp Strategy Real Estate Review Business Planning Account Optimization Tax Planning
<b>Meeting 4</b>		Employee Benefits Life Insurance Disability Insurance Estate Planning Action List

Choose from meeting every 2, 3 or 4 weeks with meetings pre-scheduled upfront.

For clients in Washington, fees will be billed at \$250/hour for actual hours of service.

The above fees are based on estimated hours of service.



# ONGOING PLANNING

## Meeting 1: Annual Plan Refresh

Values Check In  
Annual Goal Setting  
Cash Flow Review

Debt Management  
Refresh Goal Calcs

## Meeting 2: Investment & Tax Review

Progress Check In  
Investment Review

Tax Planning Check In  
Equity Comp Planning

## Meeting 3: Protection Review

Progress Check In  
Life Insurance  
Disability Insurance

Umbrella Insurance  
Estate Plan Review

## Meeting 4: Year End Review

EOY Goal Progress  
Employee Benefits  
Equity Comp Planning

Business/RE Planning  
Tax Planning Check In  
Account Optimization

Once the initial plan is complete, we'll shift into the ongoing planning service model.

One additional check-in meeting is available as needed throughout the year.

For clients in Washington, fees will be billed quarterly,  
in arrears at \$250/hour for actual hours of service.

The above fees are based on estimated hours of service annually.

