



Optimizing Financial Possibilities  
Unfolding Life Potential

### **Financial Planning Bites**

In addition to our comprehensive Journey of Financial Health™, we are working with clients with smaller offerings – **“Financial Planning Bites”**.

\* Real Estate planning

\* Beneficiary review on contractual financial accounts (i.e. Life insurance; IRA, Employer Plans)

\* Investment allocation review

\* 2021 Intentional spending plans

\* Social Security Optimization

\*Philanthropic strategies

Your investment in each bite is \$499.00 – contact us for more details on scope of service.

Take one bite or two! If you move forward with the comprehensive planning, these “bites” will be wrapped into your larger life plan cost.

**[Talk to us today](#)**