



# READY TO PLAN FOR YOUR FINANCIAL FUTURE?

Get started with  
Boston Wealth Strategies!





## Next Generation Planning



Engage with one of our  
CERTIFIED FINANCIAL  
PLANNER™ professionals to  
start planning.

### As Needed

Review cash flow, investments, employee benefits, retirement plans, and insurances, depending on your specific needs.

Access to worksheets and material in preparation for the meetings to guide your conversation.

**\$325/hour**

### Ongoing

Review cash flow, investments, employee benefits, retirement plans, and insurances, depending on your specific needs.

Access to one of our CFP® Professionals at your convenience to ask questions and discuss your financial goals and objectives

Personalized support and access to your customized financial planning website, powered by eMoney.

**\$100/month**

### Contact us now!

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**BostonWealth**  
STRATEGIES  
Your Financial Journey. Our Expertise.