



THE COMPLETE PLANNING REVIEW APPROACH

Complete Planning and Review (CPR) forms the foundation of our partnership, focusing on your family's goals, priorities, and finances while ensuring accountability on our part.

Here's how it works...

STEP 2

\$500 (ONE-TIME COST)

PLANNING AND COLLABORATION

2 meetings to gather info, discover your goals, and start a plan that you can DIY or hire us to help get going. We'll gather info, ask a bunch of questions, and provide feedback and recommendations.

You'll get...

- a net worth statement and investment allocation summary
- a written 1-2 page plan with timeline and tasks to complete
- a 3-4 page personalized tax planning analysis and report
- Basic investment strategies, income planning, estate planning, special needs planning strategies, retirement planning and anything else specific to your situation.
- A full breakdown of what it will cost to hire us as your advisor.

You can stop here and go it alone, or hire us to be your ongoing financial advisor. Step 2 is a basic plan with a high level overview of your situation. For a more detailed plan where we fill in all the blanks and help you implement, see step 3.

If, for some reason we get into this step and discover that we're unable to help you or we're not a good fit, there will be no cost to you.

STEP 1

\$0/NO COST

INTRODUCTIONS

Phone Call - A quick chat to find out if working together makes sense. This usually takes 15-30 minutes. The goal is to get to know you, your situation, and what you're looking for in a financial planning relationship. We then share how we work with you so you can leave this meeting knowing if we're the right fit.

STEP 3

\$2000 (ONE-TIME COST)

IMPLEMENTATION AND ACCOUNTABILITY

If you want to hire us to implement and monitor your plan, this is where we'll get to work for and with you. We'll put your strategies in place to work towards your goals. This is where we'll allocate investments, analyze retirement accounts, explore tax planning strategies, update estate planning issues, address legacy planning, and make sure we cross the T's and dot the I's.

You'll have online access so you can watch and monitor progress in real time, and get you on our client service calendar for the next 12 months. We typically meet 1-2 times per year to review, update, and monitor progress but can be more/less based on your preferences.

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