Financial Planning On ***Your*** Terms

SEQUOIA WEALTH ADVISORS & Investment Management, Inc.

Financial planning can require a significant amount of time, energy and resources to manage, and the risks of failing to properly plan can be significant. Sequoia Wealth Advisors gives you the opportunity to outsource some or all of this responsibility, freeing up time for the things that are important to you. Learn more about our services and how financial planning may benefit you by scheduling a consultation with our team.

Comprehensive Financial Plan

Joint | Individual | Multiple Scenario

The holistic approach that covers just about everything!

- Work with our team on single scenarios, specific topics or areas of importance, as well as your comprehensive family or individual plan.
- Main topics often include: retirement, education, estate, tax strategies and much more!
- Ongoing maintenance
- Access to your personal, secure, financial planning dashboard

Additional services provided as needed, such as Estate and tax planning.

Basic Financial Plan

We will work with you to get started by focusing on your current goals and priorities and can add targeted strategies as needed.

- Newly Married / Divorced
- Starting Your Career
- Creating a Budget You Can Live With
- Making Sure You Are On The Right Financial Track

Prices are determined by the complexity of the plan.

Targeted Planning Strategies

Collaborate with our team to either focus on the areas that are most important to you or you can build your own plan.

- Retirement Planning / Retirement Income Strategies
- Advanced Tax Planning Strategies
- Spending / Budgeting – Strategic Money Management
- Family Money Dynamics / Family Support Issues/Elder Care
- Investment Withdrawal Strategies
- Startup, acquiring and transitioning your businesses
- Stock Options / Concentrated Position Management
- Providing for Loved Ones / Multi-Generational Estate Planning
- Business or Real Estate Investment
- Compensation / Executive Benefits/ESOP 1042 Exchange
- Premarital Financial Planning and Counseling
- Post Divorce Financial Planning
- Social Impact Investing – Using your money to make a difference
- Charitable Giving – How to effectively donate money.
- Social Security Analysis
- Education Planning
- Life Insurance Needs / Long Term Care Planning

Hourly Consulting with CFP®/CIMA®

For self-directed individuals, who would like a second opinion on their current strategy from a credentialed professional.

- CFP® - CERTIFIED FINANCIAL PLANNER™
- CIMA® - CERTIFIED INVESTMENT MANAGEMENT ANALYST™

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Financial Planning On ***Your*** Terms

On-going Plan Maintenance

SEQUOIA WEALTH ADVISORS & Investment Management, Inc.

Effective: 9/27/21

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For ongoing maintenance after the initial implementation of your financial plan, choose from the following for pricing and services.

Tier One

- Annual plan review to evaluate your progress-to-goal and help keep you on track
- Access to Wealth Vision* and support to keep your data up-to-date efficiently and effectively
- Access to our professional planning team to answer your questions, giving you confidence in your plan and your future

Tier Two

- At least once a year, we'll take a financial deep dive to ensure you have everything covered and there are no financial blind spots
- Tap into our talented team of credentialed financial professionals and extensive access to our planning resources
- Planning in real-time through Wealth Vision* access and support
- Regular email check-ups that will provide relevant and timely advice so you stay on top of your financial future

Tier Three

- Unlimited phone and email access to the planning team and other professionals, supporting you every step of the way
- "Planning on your terms": giving you the option of monthly or quarterly check-ins to help you stay on track and monitor your progress-to-goal
- Comprehensive reviews throughout the year to make sure you stay on track when life happens; adapting your plan quickly
- Strategy sessions (coordinating with your financial professionals as needed) where we'll dive deeply into life's most complex situations to help you make smart financial decisions on a variety of topics customized for your specific needs
- Real-time planning through Wealth Vision* access and support
- Optional financial education for your children or loved ones designed to cut across generations and help them become good financial stewards

Hourly Consulting with CFP®/CIMA®

For self-directed individuals, who would like strategic assistance from a credentialed professional.

- CFP® - CERTIFIED FINANCIAL PLANNER™
- CIMA® - CERTIFIED INVESTMENT MANAGEMENT ANALYST™

**Wealth Vision is your Personal Financial Website, where you can keep track of your plan, financial situation and progress toward your goals.*
PLEASE NOTE: For clients who utilize our investment services, some or all of these planning fees may be waived.

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