



Financial Consulting Services

Your priorities. Our experience. Here when you need us.

Wish you had a dedicated financial advisor?

We can help — with the Financial Consulting Services program — providing the support you need at a frequency and fee structure that work for you. Through this program you'll work with a dedicated advisor who's committed to understanding your priorities and financial goals.

Why the Financial Consulting Services program?

Because engaging a financial advisor should be simple and on your terms.

Our advisors understand that your time is valuable and your circumstances are unique to you. Whether you're just getting started on your financial journey or have been investing and saving for years, we can help:

Define and
prioritize your
financial goals

Discuss and
design a
customized
goal-focused
strategy

Review
progress

Consult on
options that
address your most
pressing issues

Develop a plan
to help you
achieve your
long-term goals

Review and
adapt to
changes that
occur over
time

Available when you need us

With Financial Consulting Services, you can select the service model that works best for you:



Subscription service

Continuous access to financial consulting services for a defined time period and an agreed upon fee



Point-in-time service

As-needed access to financial consulting services, billed hourly or as a flat fee at an agreed upon rate

Solutions to meet your unique needs

We'll work to help protect your lifestyle, priorities, and financial future. This may include:

Financial health/Financial wellness

- › Debt reduction
- › Social Security strategies
- › Budgeting

Risk consultation

- › Explanation of different insurance types
- › Insurance coverage adequacy in the event of disability, death or long-term care needs

Investment/Asset allocation consultation

- › Asset allocation and risk tolerance
- › Investment market considerations

Education Funding

- › Education savings needs
- › Investment vehicles and strategies to fund education expenses



Let's get started

Interested in learning more about the Financial Consulting Services program? Contact your financial advisor.



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