



## PERSONAL BUNDLE

### Easy Monthly Fee



Everything you need to reach your goals faster.

#### 1 | CASH FLOW SUCCESS PLANNING

A strategic plan for your personal cashflow & active support so you can make your cash flow goals a reality.

#### 3 | WITHHOLDING ANALYSIS

Review of your tax withholding to make sure you're aligned with your other goals and protecting against any bad surprises.

#### 5 | PROACTIVE TAX PLANNING

Ongoing review of your tax situation so you'll know you're paying the least possible tax & can invest your income in other ways.

#### 7 | IRS CORRESPONDENCE ASSISTANCE

Never fear correspondence from the IRS, State, or local agencies. We'll tell you what it means & exactly what needs to be done to address it.

#### 2 | NET WORTH ANALYSIS

Gain power from knowing the exact picture of your current financial health. Know where you are & track your progress.

#### 4 | PERSONAL FINANCIAL REVIEW

Know all the critical areas of your financial life are covered, plus guidance & help if anything is missing.

#### 6 | PREPARATION & FILING OF YOUR RETURN

Your state & federal return will be taken care of in the best possible way, by our experienced professionals.

#### 8 | YEAR-ROUND ACCESS TO YOUR TEAM

Year-round access to your personal financial advocate. We fight in your corner with knowledge & data you won't find anywhere else!

get in touch

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