Quick Start Process

1. Free 30-minute initial consultation.
2. Schedule 90-minute meeting. We will address 1-3 topics of your choosing as thoroughly as possible within the time allotted.
3. Complete your pre-work at least 2 business days prior to our meeting. If it is not complete, please reschedule.
4. Planner will review your pre-work and prepare for our 90-minute meeting.
5. During our meeting, the planner makes notes of what we discuss and will prepare additional follow-up items.
6. You will receive a personalized follow-up document and one week of email follow up after you receive that document.

Fees:

$375 billed prior to the 90-minute meeting; $375 billed after the 90-minute meeting.

Your follow-up document will be delivered upon receipt of 2nd payment.

My goal is to provide financial planning value that exceeds the costs. Value can be financial in nature and will compound over time. It is often also intangible, captured through peace of mind and delegation of financial tasks to a professional.

If at any time you do not believe you have received value from financial planning, please contact me (sarah@realestatewealthplanning.com) for a refund or to cancel future services.

Required Pre-work:

1. Fill out the Asset-Map.
2. Fill out the Onboarding Questionnaire - much of it is optional and you will upload relevant documents to PreciseFP. If you have anything else you want me to look at, upload them to the Google Drive folder provided to you.
3. Connect accounts within Right Capital if you want me to review your budget, debt or investments.

4. Fill out the Risk Tolerance Questionnaire (emailed to you) if you want to discuss investments.
5. Come with questions!

Optional Pre-work:

1. Watch the videos in our Investment Basics document (10 minutes)
2. Read Pursuing a Better Investment Experience (2 pages)
3. Look at pages 94-99 of the Matrix Book (pages 49-51 in the PDF).
4. Familiarize yourself with pages 82-93 of the Matrix Book (pages 43-48 in the PDF)
5. Read the articles contained in the "further reading" section of the Investment Basics document.

Appendix: