Phase 1: Comprehensive Financial Plan & Initial Onboarding

REAL WEALTH PLANNING

Title	Topics	Action Steps
Imagination & Vision	Imagination Meeting Exercises	Before we start to put any financial plan in place, we help you verbalize how to align your time and treasure to your vision and values.
Obstacles & Organization	Onboarding Checklist Issues to Consider as a New Client Master List of Goals	We will go through our onboarding checklists together, and discuss any obstacles that may come in the way of living your most fulfilled life.
Explore Possibilities	Your Ideal vs. Typical Day, Week, and Year Does your budget and cash flow support your goals?	We will discuss how your budget and cash flow can support your goals.
Plan Delivery	Review proposed plan and future cash flows Review retirement, estate, tax, investments & debt.	We will present your custom financial plan, along with future cash flows and a high-level overview of retirement, estate, tax, investments, debt and education.
Investments	Investment Education Create & fund investment accounts (if applicable)	In this meeting, we will educate you on investments, and if applicable, help you open accounts with our custodian, Altruist.

This initial set of meetings comprises our comprehensive financial life plan; it usually takes 3-6 months and starts at $3,250 as a one time flat fee. Clients that choose to have our firm manage investment, retirement & brokerage accounts will onboard with our custodian at the end of the process.

Where Wealth Meets Wisdom

At Real Wealth Planning, we partner with individuals, families, organizations and real estate professionals to create a foundation for lasting financial freedom. Through our comprehensive life planning process, we craft custom financial plans that generate *real* wealth–the kind that isn't measured by a number but by the freedom you have to wake up each morning and pursue what you love.

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