



POINTER CREEK

WEALTH MANAGEMENT



Plan Packages	Financial Independence Plan Level I	Financial Independence Plan Level II	Financial Independence Plan Level III
Overview	Basic plan for those wanting to build confidence about their financial future. Digital only delivery of plan appropriate for those comfortable with technology.	Additional scenarios allow for increased plan complexity and more nuanced approaches to financial planning. Printed spiralbound plan.	Maximization of value. Can accommodate multiple scenarios and full complexity; leave no stone unturned. Full color printed plan presented in a leather binder.
Discovery meeting	✓	✓	✓
Data verification meeting	✓	✓	✓
Plan delivery meeting	✓	✓	✓
Financial Wellness & Value of Planning Dashboards	✓	✓	✓
Weekly key numbers subscription	✓	✓	✓
Vault access	✓	✓	✓
General employee benefit advice	✓	✓	✓
Personalized Social Security claiming strategy	✓	✓	✓
Techniques / scenarios modeled in plan	Up to 2	Up to 4	Up to 6
Personal financial view website access period	6 Months	12 Months	24 Months
Digital copy of your Financial Independence Plan	✓	✓	✓
Printed Financial Independence Plan		~25 pages printed spiralbound plan	~100 pages printed in leather binder
Integration walkthrough (setup access for all your financial accounts consolidated in eMoney)		30 Minutes	60 Minutes
Refreshed plan output		Full plan is regenerated at 6 months	Full plan is regenerated at 6, 12, and 18 months
Additional plan development/implementation meeting		30 minute meeting	(2) 30 minute meetings or single 60 minute meeting
Fiduciary analysis of employee retirement plan			✓
Self-service access to eMoney planning tools and reports			✓
Plan check-in calls throughout 18-month period			✓
Price range	\$1,500 - \$2,000	\$2,000 - \$3,000	\$3,000 - \$5,000
Key extras include...		Additional meeting for deep-dive into important topics. Complete plan refresh @ 12 months. Basic assistance on technology aspects.	(2) extra meetings for deep-dive into important topics. Complete plan refresh @ 6, 12 and 18 months. Full support through technology aspects of plan and implementation. Full fiduciary review of employee benefits and employer retirement plan(s).

Financial Planning services offered by CERTIFIED FINANCIAL PLANNER™ practitioner Bryan M. Renner, CFP®, an Investment Advisor Representative of Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Pointer Creek Wealth Management, LLC and Cambridge are not affiliated. Cambridge does not provide tax/legal advice. Tax projections provided are intended to serve as an informational tool, we are not tax attorneys and projections should not be construed as tax advice. Securities offered through Registered Representatives of Cambridge Investment Research, Inc., a broker-dealer, member FINRA/SIPC.



Client(s): _____

Plan Date: _____

Based on your Financial Plan objectives, we have agreed to provide the following, under customary plan delivery timelines:

- ☐ Financial Independence Plan – Level I \$1,500 to \$2,000
- ☐ Financial Independence Plan – Level II \$2,000 to \$3,000
- ☐ Financial Independence Plan – Level III \$3,000 to \$5,000
- ☐ Hourly Financial Planning Services

The estimated total for Pointer Creek Estate Planning Services selected above is \$_____. Charges will not exceed estimate without prior consent.

Your initial payment required prior to data verification meeting is \$_____.

Per CFP® practitioner board standards, your written planning agreement detailing the scope of work must be signed and dated prior to us making any recommendations as a fiduciary.

Estate Planning services offered by CERTIFIED FINANCIAL PLANNER™ practitioner Bryan M. Renner, CFP®, an Investment Advisor Representative of Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Pointer Creek Wealth Management, LLC and Cambridge are not affiliated. Cambridge does not provide tax/legal advice. Tax projections provided are intended to serve as an informational tool, we are not tax attorneys and projections should not be construed as tax advice.