

WE HELP YOU MAKE SMART FINANCIAL DECISIONS

OUR PROCESS



INITIAL MEETING

- Values card deck
- Balance sheet review
- Insurance review
- Credit score review
- 90 minute meeting



PLAN DESIGN MEETING

- One-page financial plan
- SWOT analysis
- Spending plan and cash flow
- Liquidity analysis
- Investment review
- Tax review



PLAN DELIVERY MEETING

- Dreams and possibilities
- Estate planning review
- Financial independence projection
- 12 month financial road map



IMPLEMENTATION AND ONGOING SUPPORT

- 4/2 service model
- Update meetings every 6 months, check-ins every 3 months
- Unlimited phone and email support



Ballast Point
Financial Planning

SERVICES

ONE-TIME ONBOARDING FEE

JUST OUT OF
COLLEGE



\$500*

SINGLE, NO
CHILDREN



\$1,000*

STARTING,
GROWING A FAMILY



\$1,999*

NEAR OR ENTERING
RETIREMENT



\$2,999*

**Based on normal complexity and can be paid in two installments*

IMPLEMENTATION AND SUPPORT



Fee ranges from
\$199-\$499/month
depending on complexity

READY TO GET STARTED?



Sign client agreement



Pay deposit



Schedule initial meeting

650-636-7526
www.ballastpointfp.com