FINANCIAL PLANNING SERVICES

Designed for individuals, families, and business owners who want clarity, confidence, and a strategic partner for their financial future.

TAYLOR FINANCIAL

Foundational Planning

Ideal for clients who want clarity and a strong roadmap for the next one to three years.
This tier provides essential planning, ongoing support, and professional guidance to help you stay organized and confident.

$400 a month for quarterly meetings
$300 a month for semi-annually meetings
**Fees are paid annually or semi-annually and are renewable on an annual basis*

What You Receive:

- Year-round access to our team
- A fully updated annual financial plan
- Real-time access to planning technology with ongoing adjustments
- Cash flow and budget review
- Insurance needs analysis
- Asset allocation review and recommendations
- Debt management strategies
- Retirement income projections with goal tracking
- Education and student loan strategies
- Risk tolerance and portfolio alignment review

Outcome
A clear, organized foundation for your financial life so you always know your next step.

Comprehensive Planning

Designed for clients with complex situations who want coordinated tax and estate planning, retirement strategy, investment analysis, and multigenerational planning.
This tier provides concierge advisory support and advanced modeling to help you manage, grow, and protect your wealth.

$1000 a month for monthly meetings
$650 a month for quarterly meetings
**Fees are paid annually or semi-annually and are renewable on an annual basis*

What You Receive:
Everything in Foundational Planning plus

- Advanced investment strategy review, including alternative assets
- Retirement income optimization
- Executive compensation and benefits planning
- Advanced tax planning strategies
- Pension and Social Security optimization
- Multigenerational estate and wealth transfer planning
- Charitable giving plan design
- Coordination with your CPA and estate planning attorney

Outcome
A fully integrated financial strategy that aligns taxes, investments, retirement, and legacy planning your long-term vision becomes reality.

Business Planning

Best for business owners who want long-term financial and operational leadership without hiring a full-time CFO or COO.
This tier delivers strategic planning, financial analysis, and ongoing business support to increase profitability and scale efficiently.

$1,000+ a month for biweekly meetings based on gross revenue and employee size
**Monthly retainer, renewable on an annual basis*

What You Receive:

- Strategic goal setting and long-term business vision planning
- Financial statement review with profitability and cash flow improvement strategies
- Entity structuring and organizational design
- Operational and process efficiency analysis
- Employee compensation and benefits planning, including retirement plan design
- Tax optimization strategies in collaboration with your CPA
- Long-term succession planning, valuation support, and exit preparation
- Guidance on leadership, hiring, and resource management
- A unified strategic plan that ties your personal and business goals together

TAYLOR
FINANCIAL