

Financial Foundations Planning Package



(Est. 4 hours – 7 hours)

SFP created the Financial Foundations program to help young adults get off on the right foot financially. This program includes both educational elements and practical applications to help participants establish a strong financial foundation that will carry them into the future. Financial Foundations makes a great gift for a recent college grad!

Average Range: 4 – 7 hours including meeting preparation, meetings, and meeting follow-up. Estimated fees are based on a typical engagement and may be outside of the range referenced above, depending on your specific situation.

STANDARD:

Financial Health Scale (FHS): This brief questionnaire is designed to offer a quick assessment of your overall financial health by measuring a variety of feelings and behaviors related to money and personal finances. The FHS is designed to be a starting point for conversations and can be used to measure improvements in financial health over time.

The Art & Science of Investing: There are two components to having a successful investment experience: what you know and how you behave. This introductory presentation examines both the technical and the behavioral to help new investors develop confidence and a strong financial foundation.

Benefits Selection/Open Enrollment: Benefits make up nearly a third of average total compensation for workers so making the right choices each year is critical. SFP can help you with benefit selection during open enrollment to ensure you make choices that align with your goals.

Partial Investment Analysis: SFP will review your company sponsored retirement plan (401(k), 403(b), 457, TSP, etc.) and/or health savings account and advise on asset allocation and investment selection.

Beyond our standard package, we can provide additional consultation around debt and investments. Timing will vary depending on the specifics of the client situation.

OPTIONAL:

Student Debt Analysis and Solutions: Review of current student loans and analysis of potential debt reduction strategies including income repayment plans and refinancing.

Credit Card Debt Analysis and Solutions: Review of credit card debt and analysis of potential debt reduction strategies including payment plans, consolidation, and refinancing.

Other Investment Recommendations & Asset Allocation: SFP will review any investment accounts outside of workplace plans and advise on asset allocation and investment selection.