

Financial Guidance As Easy as **A-B-C**

A



GET **A**CQUAINTED

- i. Complimentary Inquiry Call (15 – 30 minutes) to determine if Sanctuary is a good fit for you.
 - ii. Complimentary Discovery Call (1 hour) to better understand your specific goals and needs.
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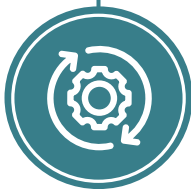
B



BUILD YOUR PLAN

- iii. Choose from one of our 3 fixed fee planning packages:
 - **Basic** – low complexity; up to 3 meetings over 4 – 6 weeks
 - **Core** – medium complexity; up to 5 meetings over 3 – 4 months
 - **Premier** – high complexity; all-inclusive for 1 year
 - iv. Implementation of plan recommendations (included with Premier; available for an additional fee for Basic and Core)
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C



CONTINUOUS SUPPORT

- v. After initial planning engagement/implementation is complete, opt-in to our monthly Ongoing Support Services for continuous guidance on your financial journey because one thing is certain: things change.



OPEN ENGAGEMENT

For projects that fall outside the scope of our planning packages, SFP is available to consult on an hourly basis.