sanctuary
FINANCIAL PLANNING

704.705.8773
SANCTUARYFP.COM

PLANNING PACKAGES

	BASIC	CORE	PREMIER
About the Plan			
Who it's for	For those starting out on their wealth-building journey; those with basic planning needs.	For those with a full plate and competing demands on time and resources; those navigating multiple financial decisions.	For those with more complex planning needs including business owners; those approaching retirement.
Complexity	Low	Medium	High
Estimated time for initial plan	4 – 6 weeks	3 - 4 months	1 year
Before the Numbers			
Preferences, perspectives & values	✓	✓	✓
Financial Framework			
Cash flow, goals & savings analysis	✓	✓	✓
Review tax allocation + basic tax planning opportunities	✓	✓	✓
Beneficiary & title review	✓	✓	✓
Insurance analysis (life, disability) + recommendations	✓	✓	✓
Insurance analysis (LTC) + recommendations		✓	✓
Education analysis		✓	✓
Home purchase / relocation		✓	✓
Charitable giving strategies		✓	✓
Equity compensation and/or business owner planning			✓
Roth conversion strategy			✓
Retirement income distribution strategy			✓
~ Number of financial framework meetings	1	1 – 2	2 – 3
Investments: Review + Recommendations			
Employer-sponsored plan, e.g., 401(k)	✓	✓	✓
Personal investment accounts		up to 6 accounts	up to 20 accounts
Annuities			✓
~ Number of investment meetings	1	1 – 2	2 – 3
Price			
Initial plan	$2,500	$5,500	$8,500
Billing *Payment plans available upon request*	Deposit: $1,250 Balance due upon completion	Deposit: $1,600 $1,300/month for 3 months	Deposit: $2,000 $1,300/month for 5 months

Continued next page.

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IMPLEMENATION & ONGOING SUPPORT

After the initial planning engagement is complete, we are available to provide assistance with implementation. For Basic and Core clients, this optional service is available for an additional fee as outlined below. Implementation is included with our Premier planning package.

	BASIC	CORE	PREMIER
Implementation			
	Optional*	Optional*	Included
Review paperwork for transfers/rollovers	*	*	✓
Assist with rollover calls	*	*	✓
Assist with trading	*	*	✓
Proactive follow-up to help you put the plan into place	*	*	✓
Answer questions	*	*	✓
Help you navigate unexpected obstacles so you can prepare for your financial future	*	*	✓
	$1,000	$1,000	Included

For consistent and proactive support, we offer Ongoing Support Services for a monthly fee. This is an optional service for Basic and Core clients. It is included during the 1st year for our Premier clients and can be continued upon the conclusion of the engagement for a monthly fee.

	BASIC	CORE	PREMIER
Ongoing Support			
	Optional*	Optional*	Included – 1st Year
Periodic plan updates as needed (you initiate)	*	*	✓
Well-being check-ins (we initiate)	*	*	✓
Periodic investment oversight	*	*	✓
Benefits review at open enrollment	*	*	✓
Annual tax planning report	*	*	✓
Rediscovery meeting (every other year)	*	*	✓
Answer questions	*	*	✓
Provide ongoing support so that you don't have to worry about your money	*	*	✓
	$229/month	$229/month	1st year included then $229/month

Sanctuary Financial Planning (SFP) does not custody assets or have discretionary authority. You are responsible for implementing any recommendations. SFP can assist with implementation for an additional fee for Basic and Core planning clients. Implementation is included with Premier plans.

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