HARMONY
WEALTH ADVISORS

When was the last time you sat down and had a frank conversation about your financial plan?

People think financial advice is all about the “how” and the “when” and the “where.” It’s not. Financial advice is really about the “why” and the “who.” Why have you chosen your path in life? Why are you saving and investing? Who is on the journey with you? Who do you need to love and protect? Let us help you answer those questions. At that point, the “what,” “where,” and “how” all fall into place.

Design - $1,750

All financial planning engagements will begin with a three-phase design.

- Phase 1 - Discovery and goal setting
- Phase 2 - Construction of customized financial plan
- Phase 3 - Financial plan review session, roll out of client dashboard and ongoing action item tracker

Topics Covered (if relevant) - Retirement, Investments, Insurance, Education, Tax, Estate, Personal Balance Sheet, Cash Flow, Debt and Liquidity Analysis

Implement - $125/hour

Action item execution phase where we will help “quarterback” the implementation of your financial plan. Not all plans are alike. Some are fairly straightforward, as they require little to no help, while others have a multitude of layers that need a lot of guidance. Because of this, we price this out as an hourly rate instead of flat fee.

Monitor - $500 annual / $2000 quarterly

Depending on your situation, you may wish for touchpoints throughout the year. If so, we will set a series of meetings that make most sense for your situation so that we can review your financial plan to ensure it continually aligns with changing circumstances and goals.

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