HOW WE COMPARE

	Values Added Financial	Non-Fiduciary Planners	CPA, Tax Accountants
Portfolio & Net Worth Analysis	●●●	●●●	
Retirement Planning	●●●	●●●	
Investment Implementation	●●●	●●	
Insurance Analysis (home, life, disability)	●●●	●●	
Student Loan Management	●●●	●	
Estate Planning	●●●	●	
Mortgage Review & Advice	●●●	●	
Cash Flow Analysis (goals, spending)	●●●	●	
Goal Setting	●●●	●	●
Education Planning	●●●		●
Tax Projections & Planning	●●●		●
No Sales/Commissions (flat fee)	●●●		●●
Fiduciary (puts your needs first)	●●●		●
Employee Benefits Review	●●●		
Career Growth Management	●●●		
Charitable Giving Impact & Efficiency	●●●		
Coaching (financial, life, business)	●●●		
Advice As Often As You Need	●●●		

●●● Always ●● Sometimes ● Rarely