Young Professionals Program

We have met many young professionals that want financial planning advice. Unfortunately, some advisory firms are focused on asset management rather than financial planning. These firms may be reluctant to work with young professionals, many of whom are just beginning to accumulate wealth. Still, they want and need financial planning advice!

We have created an offering to help young professionals resolve the financial issues most relevant to them. The service costs $150 per month and includes the following:

- **Initial Meeting to set Financial Goals**
- **Budgeting Basics**
  --How to create a budget
  --How to determine the proper amount of money to maintain in an emergency fund
  --Introduction to your budgeting tool and personal financial website
- **Debt-Reduction versus Investing**
  --How to prioritize paying off your debts
- **Best Practices for merging finances with your significant other**
- **How to determine and improve your credit score**
- **Retirement Basics**
  --Determine your risk tolerance using an online tool
  --Create a savings and investment plan that acts as a road map for you to follow as you accumulate wealth
  --How much money to contribute to your retirement plan
  --Where to invest your retirement contributions
- **Estate Planning Basics**
- **Insurance Consultation**
  --Disability insurance
  --Life Insurance-why/when will you need it
- **Final 60-90-minute meeting to go over everything and answer remaining questions**

CONTACT US

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FINANCIAL STRATEGIES GROUP

GIVING MORE ...than just investment advice.