Our Difference

1

Affordable Financial plans for all budgets

2

Advice given for every income level

3

Personal and customized experience

FEEL GOOD INVESTMENTS

To learn about our other service offerings and how we can help you create generational wealth visit our website
feelgoodinvestments.co

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FINANCIAL PLANNING

Service overview and Fee structure

Budget

This package is for individuals beginning their wealth journey. It includes one consultation and a financial plan that provides an overview of your current financial state. The financial plan outlines your income against your expenses and forecasts your savings and investing potential.

$300 per plan

Save

This package is for individuals who need guidance on how to save, pay down debt and establish financial goals. It is the Budget plan plus a savings plan. It includes two consultations and a financial plan that explains which saving behaviors and payment strategies will help you achieve your financial goals.

$450 per plan

Start Investing

This package is for individuals who have money saved and need guidance on how to invest. It includes three consultations and a financial plan. It assesses your cash flow, savings and risk tolerance to develop an investment strategy that will help you achieve your financial goals.

$850 per plan

Assess Wealth

This package is for individuals who have savings and investments. It forecasts various scenarios to determine the best saving and investing strategy to meet retirement and other long-term goals. It includes four consultations, in-depth analysis and a comprehensive financial plan.

$1200 per plan

Customized Plan

This service is for individuals who need more research and analysis than our standard packages provide. Clients selecting this service usually have a complex financial situation. Each hour of work is charged at an hourly rate of $150 per hour and billed weekly during the course of the work.

$150 per hour

Note.

Each of the standard packages are based on the estimated hours it will take to develop your plan. Additional hours of work including consultations are charged hourly.

Allocated plan hours:

- Budget = 2 hours
- Save = 3 hour
- Start Investing = 6 hours
- Assess Wealth = 8 hours
- Additional Hours = $150 per hour

Achieve your financial goals with confidence and ease.

Contact us now for your personalized financial plan

Contact

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