Aspire Financial Group, LLC

TARGET ASPIRATIONS

SUBSCRIPTION-BASED FINANCIAL PLANNING

Many financial advisors work strictly on an “assets under management” model, setting minimum account balances to work with a client. But clients looking for financial planning guidance may not have the assets to meet these minimums, have most of their financial assets invested in employer retirement plans, or want to manage investment accounts themselves but still desire some general guidance. While we do manage client investments, we also work with clients who are strictly seeking financial planning services.

For those clients, the next generation of financial services is here. Target Aspirations gives clients direct access to the same cutting edge financial planning technology that we make available to our investment advisory clients combined with ongoing consultation with our advisors. Choose the subscription package best for you and pay monthly via credit card or ACH, just like your other subscription-based services.

FINANCIAL PLANNING BENEFIT	GOLD	PLATINUM	PLATINUM RETIREMENT
Review meeting with Financial Advisor	*Annual*	*Semi-Annual*	*Semi-Annual*
Online Financial Planning Portal	●	●	●
Financial Account Aggregation[1]	●	●	●
Personal Document Vault	●	●	●
Mobile App	●	●	●
Net Worth Statement	●	●	●
Cash Flow and Budget Analysis	●	●	●
Goals Based Planning & Monitoring[2]	●	●	●
Modified Cash Flow Based Planning & Monitoring[2]		●	●
Retirement Check-Up	●	●	●
Investment Review	●	●	●
Employer Retirement Plan Review	●	●	●
Risk Analysis (premature death/disability)	●	●	●
Tax Return Analysis		●	●
Stock Option Analysis		●	●
Retirement Income Projections		●	●
Household Balance Sheet Analysis			●
Defined Benefit Pension Survivor Option Analysis			●
Lump Sum vs. Annuity Pension Analysis			●
Social Security Benefit Analysis			●
Investment Distribution Planning			●
Roth Conversion Review			●
Wealth Transfer and Legacy Planning			●
Charitable Giving Strategies			●
Collaboration with Attorney, CPA, Other Professional Advisors		●	●
PLAN COST AND ONGOING MONTHLY FEES	Plan Only: $600 *Ongoing Planning: $50/month*	Plan Only: $1,500 *Ongoing Planning: $125/month*	Initial Plan:[3] $1,500 *Ongoing Planning: $125/month*

Additional customization of services is possible based on client needs. Depending on scope of customization, there may be a fee adjustment.

To learn more or subscribe to Target Aspirations, contact:

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[1] Account aggregation limited to investment providers that allow linking of accounts to our planning portal.
[2] Goal monitoring not included in Plan Only Option.
[3] Ongoing Retirement Platinum service requires completion of the initial retirement income plan.