Financial Planning On ***Your*** Terms

Financial planning can require a significant amount of time, energy and resources to manage. Alpha Wealth Management and Planning gives you the opportunity to outsource some or all of this responsibility, freeing up time for the things that are important to you.

Learn more about our services and how financial planning may benefit you by scheduling a no-cost consultation.

Comprehensive Financial Plan

The holistic approach that covers just about everything!

- Single scenarios, as well as your comprehensive family or individual plan.
- Ongoing maintenance
- Access to MoneyGuidePro*

**MoneyGuidePro is your Personal Financial Website, where you can keep track of your plan, financial situation and progress toward your goals.*
Additional services provided as needed, such as Estate and tax planning.

Basic Financial Plan

Get started by focusing on your current goals and priorities and add targeted strategies as needed

- Newly Married / Divorced
- Starting Your Career
- Creating a Budget You Can Live With
- Making Sure You Are On The Right Financial Track

Prices are determined by the complexity of the plan.

Targeted Planning Strategies

Allows you to either focus on the areas that are most important to you or you can build your own plan.

- Retirement Planning / Retirement Distribution Strategy
- Advanced Tax Planning Strategies
- Eldercare Planning
- Stock Options
- Spending/Budgeting
- Premarital Financial Planning
- Post Divorce Financial Planning
- Education Planning
- Current Financial Condition
- Providing for Loved Ones / Multi-Generational Estate Planning
- Family Money Dynamics
- Social Security Analysis
- Business or Real Estate Investment
- Social Impact Investing
- Employee Compensation / Executive Benefits
- Life Insurance Needs / Long Term Care
- Charitable Giving – How to effectively donate money.
- Startup, acquiring and funding businesses

Hourly Consulting with CFP®/CDFA®

Perfect for self-directed individuals, who would like a second opinion on their current strategy from a credentialed professional.

- CFP® - CERTIFIED FINANCIAL PLANNER™
- CDFA® - CERTIFIED DIVORCE FINANCIAL ANALYST™

Rate $250-$350 /Per Hour

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