

BONA FIDE FINANCE

FINANCE IN GOOD FAITH

PROPOSAL FOR COMPREHENSIVE REVIEW: \$5500*

Bona Fide Finance appreciates the opportunity to service your needs in this transactional engagement. We offer comprehensive financial assessments in the following areas:

Money Management

- Create personal financial statements
- Overview of budgeting tool
- Organize finances in Right Capital with a PDF handout of recommendations made

Risk Management

- Review insurance policies for adequacy, such as life, disability, home, and auto
- Run Monte Carlo analysis to assess probability of success for any proposed plan
- Evaluate asset protection strategies

Taxes

- Create strategies to minimize the impact of taxes on financial transactions

Life Planning

- Establish goals, values, and priorities
- Work through George Kinder questions
- Refine use of financial resources based on life aspirations
- Survey attitudes and perspectives on money and its use

Investment Management

- Implement strategies that are low cost, efficient, diversified, and within risk tolerance
- Determine sufficient savings rate for long-term goals
- Assess how to keep investments accessible for premature distributions for early retirement
- Maximize return for short-term goals

Meeting Frequency

The meeting frequency is scheduled every four to five weeks for the next several months with four meetings in total expected. These meetings will last approximately 90 minutes and will cover the following subjects:

1. Life Planning: Kinder Questions and Goal Determination
2. Insurance & Employee Benefit Review
3. Tax Considerations and Mid to Long-term Goal Planning
4. Discussion on Investment Options with Various Savings Vehicles

In this service plan, Bona Fide Finance examines your finances in their totality, but leaves the implementation and monitoring up to you: once completed with the review, we will hand you an assessment of your current strengths and weaknesses, with a list of actions to be taken moving forward. Email communication and access to [Right Capital](#) will remain for six months, upon which the engagement will be formally completed. Further services beyond this point will require a new engagement.

**An additional surcharge of \$500 applies if you need assistance gathering and uploading the required documentation prior to the first meeting.*