Subscription Pricing Menu

- To accompany the Pointer Creek Planning Matrix and Financial Planning Engagement -

Personal Planning Services include the modules selected on your pricing matrix, on an ongoing basis, along with access to the following: Your eMoney Personal Financial Website, secure client vault, scheduled monitoring and review by a Certified Financial Planner™ practitioner, monthly progress checks, and quarterly update meetings. Also includes our subscription based "See the Unseen" planning curriculum, whereby we focus on a specific time-relevant facet of personal financial health, illustrating where you stand in relation to that concept and specific advice on how that concept relates to YOU as an individual.

Scoring Range	Subscription Level	Cost of Subscription
1 to 10 Points	Personal I	$100/month
11 to 20 Points	Personal II	$200/month
21 to 30 Points	Personal III	$300/month

Business Planning Services include the modules selected on your pricing matrix, on an ongoing basis, along with access to the following: Your eMoney Personal Financial Website, secure client vault, scheduled monitoring and review by a Certified Financial Planner™ practitioner, monthly progress checks, and quarterly update meetings. Also includes our subscription based "See the Unseen" planning curriculum, whereby we focus on a specific time-relevant facet of personal financial health, illustrating where you stand in relation to that concept and specific advice on how that concept relates to YOUR entity.

Scoring Range	Subscription Level	Cost of Subscription
1 to 10 pts	Business I	$200/month
11 to 20 pts	Business II	$400/month
21 to 30 pts	Business III	$600/month

Multiple Entity Planning Services – Coordinated fiduciary advice considering the interactions of all personal, business, charitable and trust entities.

Scoring Range	Subscription Level	Cost of Subscription
1 to 10 pts	Comprehensive I	$350/month
11 to 20 pts	Comprehensive II	$750/month
21 to 30 pts	Comprehensive III	$1,050/month

Custom Planning Services - Calculated when categories above require special circumstances.

Scoring Range	Subscription Level	Cost of Subscription
1 to 30+ pts	Custom	Custom

**Discounted Pricing – when contracting directly from an event-based 12-month Financial Planning Engagement, into a subscription-based service, with no break in services, you will receive your first two months free (a 16.67% discount from rates above).*

Planning Subscriptions

HOW WE WORK TOGETHER

- An ongoing structured planning relationship that does not require you to proactively seek out advice for your financial best interests and pay hourly for piecemeal financial planning.

- Priority access to a Certified Financial Planner™ practitioner on an ongoing basis, for all topics related to financial planning. Existing subscribers are always prioritized over any new potential subscribers and fulfilled daily prior to all non-critical tasks.

HOW PLANNING BECOMES EASIER USING TECHNOLOGY

- Access to eMoney Personal Financial Website, including Decision Center whereby we model real-time "What If" scenarios in your plan to illustrate the impact to your plan and goals. No need to re-input all your information and wait for a report to be generated each time you have a question.

- Access to eMoney Vault, electronic storage of your critical documents in one secure location.

- Your personal secure file sharing site allows us to collaborate with your tax, legal and accounting professionals without the need for you to courier information back and forth between advisors.

HOW WE INTERACT AND MONITOR YOUR SPECIFIC GOALS

- Pre-scheduled quarterly update meetings (in-person or web-based screenshare).

- Pre-scheduled monthly progress check (for months between quarterly update meetings).

- Annual goal benchmarking and key metric benchmarking, printed and archived in your leather plan binder (included with your subscription).

- 1x per year printed plan update with commentary and benchmarking of year-to-year progress in relation to meeting your specific financial goals.

- Pointer Creek no-nonsense one-page financial dashboard, plotting your past and current net worth, income, net investable assets, progress towards goals and planning achievements, along with YOUR critical dates plotted into a timeline.