Service Overview

1. Streamlined Data Gathering

We give you access to a secure, private vault. Here you will pre-load your accounts by simply logging into them within your own vault.

2. Discovery Meeting

During discovery, we will discuss your current financial situation and future goals in great detail. As with all the meetings, you may choose face-to-face or online video meeting.

3. Recommendation Meeting

We'll offer you solutions to reach your goals, including a retirement plan, debt optimization, insurance, investments, savings, and any other areas specific to you.

4. Investment Planning Meeting

Here we calculate your true risk tolerance and engineer that risk into a portfolio fit to your unique preferences, expectations, and goals.

5. Ongoing Relationship

You get real-time reports and a single access point for all of your accounts, from investments to debts. We'll continue to monitor and optimize your investments, and have regular follow-up meetings with you. *You rest assured knowing all the pieces of your financial life are moving you in the right direction.*

Initial Investment	Monthly Planning Fee
$0 - $50,000	$250
$50,000 - $99,999	$200
$100,000 - $149,999	$150
$150,000 - $199,999	$100
$200,000 - $249,999	$50
> $250,000	INCLUDED

Investment Fee
< $1 million: 1.25%
$1-2 million: 0.75%
> $2 million: 0.25%

TD Ameritrade is the recommended custodian for holding client assets under CFG's direct management. TD Ameritrade deducts the fee with client agreement and forwards the fee to CFG.

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