Project Based "Road Map" of Services ($500 One Time)

Advisor independence allows a 100% true partnership to you and your interests

Advisor deliverables to you:

- 1 - 2 advisory appointments (60 - 90 minutes)
    - Face to face, phone, or virtual via computer screen-share
- Access to eMoney Advisor – your personal financial website
- Written steps with actionable items and execution instructions

Investment Advisory & Review

(Appointments 1 – 2)

- Client agreement form and discovery profile form
- eMoney personal website onboarding - https://wealth.emaplan.com/ema/
- Analysis of current situation vs desired situation
- Portfolio review, diversification, and asset allocation – investment advice
- Savings and/or income planning – 401k, IRA, Roth, Employer Stock, Annuities, HSA, Taxable,

Other Topics

- You are free to dictate what is important to you and what you need help with. There is a wonderful list of finance and investment topics on my website at www.tolsmainvestments.com under "services" that can aid you in this.

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