



LEARN



INVEST



CONSULT



PLAN

Pricing

Free

Fee based on
amount of
assets
managed

\$699
one-time
fee

Starting at
\$1,200
(Renewed
annually at
reduced rate)

Resources

- Newsletter
- Organizer
- Workshop
- Spending
- Outside Investment Tracking
- Education Center
- Risk Tolernace Assessment



Investing

- Globally Diversified
- Regular Rebalancing
- Low-Cost Investment Options
- Investment Policy Statement
- Elegant User Interface
- Online Portal



Planning

- Budgeting/Cash Flow
- Student Loan Debt
- Life Goal Planning
- Employee Benefits Review
- Insurance Needs Analysis
- Financial Independence
- Estate Planning
- Other (Business Planning, etc.)



Pick 2



Pick 2



Pick 2



Pick 2



Pick 2



Pick 2



Pick 2



Access

Financial Advisor



MWP Advisor

MWP
Advisor

MWP Advisor

Meeting Frequency



Annual

Limited

Unlimited

Phone/Email Access



Unlimited

Limited

Unlimited