



INSURANCE & ESTATE PLANNING

Protecting your family is important. We cover:

- **Insurance**
Health, life, auto, insurance, disability, LTC and identity theft.
- **Estate Plan Analysis**
Review your current plan or create a new one.
- **Designing New Plans**
Create a plan that works for you.
- **Estate Equilization**
Fairly divide your estate.
- **Facilitating Family Meetings**
Help your family understand your plans.

OUR PRICING

We offer different levels to fit your needs:

ORGANIZE
\$2,500/YEAR

1

INVESTMENTS & RETIREMENT
\$4,500/YEAR

2

INSURANCE & ESTATE PLANNING
\$6,000/YEAR

3

THE KITCHEN SINK
\$10K-25K/YEAR
**depending on complexity*

4

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LEVEL FOUR WHAT KEEPS YOU UP AT NIGHT?



CHANGING THE FUTURE OF FINANCIAL ADVICE.

“WHAT KEEPS YOU UP AT NIGHT?”

Do you worry about your finances?

You're not alone. At Level Four Financial, we understand that managing money can be tough. That's why we offer our 4 Levels of Planning to help ease your mind. Let us help you sleep better knowing your financial future is secure.

BUDGETING, SAVING, AND BEING FINANCIALLY PREPARED

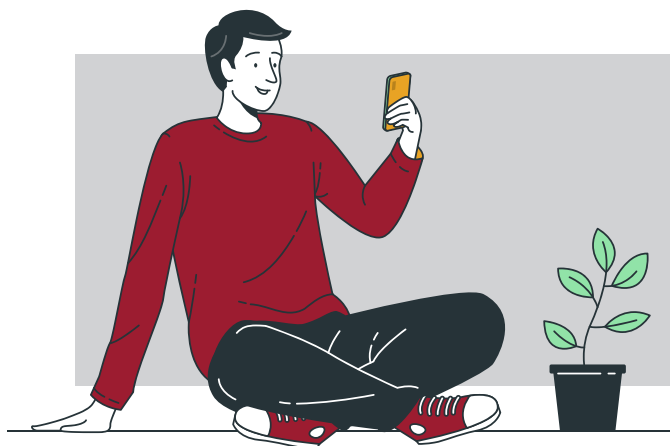
Budgeting and saving can be hard. It's tough to know if you're doing it right. We can help you create a plan that works for you. Imagine feeling confident about your money and prepared for the future. We're here to help you get there.



ORGANIZING YOUR FINANCES

Keeping track of your finances is important. Here's how we can help:

- **Personal Financial Website**
See all your finances in one place.
- **Cashflow Analysis**
Know where your money goes.
- **Wealth Coach Access**
Get advice when you need it.
- **Secure Digital Vault**
Keep important documents safe.
- **Monthly Maintenance**
We help you stay on track.



INVESTMENTS & RETIREMENT

Planning for Retirement doesn't have to be scary. We offer:

- **Fiduciary Investment Advice**
including accounts at other firms
- **Alternative Investment Analysis**
- **Guaranteed Income Analysis**
Make sure you have enough money for life.
- **Lifetime Cashflow Projection**
See your financial future.
- **Advanced Goal Modeling**
Plan for your dreams.
- **Roth Conversion Analysis**
Make smart tax decisions.