



**CENTER FOR FINANCIAL PLANNING, INC.**

Independent Registered Investment Advisor

## FINANCIAL FOUNDATION

- A 60- 90 minute basic Financial Planning Review covering up to three topics for your financial planning needs. For example: Retirement Planning, Education Planning, and Cash Flow Management, Insurance Coverage.
- Information, education and basic analysis for planning needs
- Fee for this service is \$250.
- For more information contact: The Center for Financial Planning at 248-948-7900, or ([Vicki.McLellan@RaymondJames.com](mailto:Vicki.McLellan@RaymondJames.com))

Center for Financial Planning is committed to the financial planning process. We believe that our clients are best served by an on-going and long term relationship to help them meet their goals. It is our experience that clients who have investment assets over \$350,000, net annual income of over \$150,000 or a net worth of \$1,000,000 or more, are best served by our firm.

For those who may not meet our minimum criteria for an on-going relationship, or who need a limited scope engagement to obtain advice, information and feedback about their current financial status, a "Financial Foundation" consultation may be scheduled. This consultation will consist of a 60-90 minute meeting with one of the firms' Financial Planners to review the strengths and weaknesses of your current financial situation and focus on up to three financial planning topics. Information, education, feedback and referrals (as needed) will be provided during this meeting, however a written report is not provided. Follow up contact, if desired, will be billed at an hourly rate.

- Center for Financial Planning ("The Center"), was founded in 1985. The Center's reputation is the result of our continuous, ongoing commitment to the financial planning process. *The Center's mission is to assist our clients and their families to lead more fulfilling lives by providing financial advice that results in improved and more informed financial decisions.*
- For more information about our firm, please visit our website: [www.CenterFinPlan.com](http://www.CenterFinPlan.com)

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