Affinity Members Club

Suscription Financial Planning Advice

Your Personal CFO on Demand

Membership Level	**Acclimatize**	**Base Camp**	**Climb**	**Summit**
One-time Set up for Software	$ -	$ 75.00	$ 75.00	$ 75.00
Pre-Pay Annually	$ -	$ 700.00	$ 900.00	$ 1,200.00
Pay Monthly with 1 YR Commitment (10% for Transaction fees)	$ -	$ 770.00	$ 990.00	$ 1,320.00
Tiers:				
Max. Users/Household (+2 means dependents)	1	1	2	2+2
Meetings Included/YR (In Office or Virtual) (45 min Sessions)	1 (Min $25,000)	3	6	9
Included Value:				
Financial Planning Software (Equisoft) (Value $300/YR)	✗	✓	✓	✓
Personal Online Vault (Side Drawer) (Value $48/YR)	✗	✓	✓	✓
Personalized Money Habitudes Quiz & Analysis (1 per pp per year)	✗	✓	✓	✓
Discounted Investment Management Fee	✓	✓	✓	✓
Discounted Affinity Fee	1.00%	0.60%	0.60%	0.60%
Members-Only Areas with Resources/Discounts	✗	✓	✓	✓
Annual Member Appreciation Event	✗	✓	✓	✓
Guest Speaker Webinar Series (1-3/year)	✗	✓	✓	✓
Weekly Members E-Newsletter	✓	✓	✓	✓
Personalized Advice & Support (see below)	✗	✓	✓	✓
5% of Annual Revenue supporting Social Impact Initiatives	✓	✓	✓	✓
Best For:				
Single	✓	✓	✓	✓
Single/Couples	✓	✗	✓	✓
Couples/Family	✓	✗	✗	✓
I would like occasional support	✗	✓	✗	✗
I would like some guidance & coaching	✗	✗	✓	✗
I would like regular guidance & check in	✗	✗	✗	✓
Recommended for Complex/Estate Financial Planning	✗	✗	✗	✓
Recommended for Newbies to Financial Planning	✗	✗	✗	✓

You can always upgrade/downgrade on renewal date as needed

Personalized Advice & Support on topics including:
Tax Planning
Retirement Planning
Investment Planning
Ethical/Real Estate/Crypto Investing Options
Wills & Estate Planning
Mortgages & Loans
Debt Management Strategies
Cash Flow & Budgeting
New Government Programs
Financial Coaching
Dispute & Divorce Financial Issues
Preparing for Retirement
Small Business Startups/Self-Employed/Contractors
Market Volatility & Uncertainity
Any other topics relating to Personal Finance

Available Add-on Services Offered:	***Cost***
Tax Preparation T1 Personal	$$$
Bookkeeping	$$$
One-Time Financial Planning	$$$
Executor Advisor or Estate Settlement Services	$$$
Discounted Investment Mgmt (with Subscription plan)	See Above
Regular Investment Mgmt (without Subscription plan)	1.00%
Additonal Meetings	$250/HR