



PRICING GUIDE

for Small
Businesses

eviefinancial.com (240) 403-2677
9701 Apollo Drive Ste 443, Upper Marlboro MD 20774

Business Wealth Builder

\$2500

This plan includes:

- Financial review of current or proposed business
- Cash flow analysis
- Business structure guidance
- Benefits review for owner
- Retirement planning analysis and recommendations
- Tax planning (*referral to tax professional for advanced tax planning, projections, and filing)

Business Wealth Manager

\$4000

This plan includes:

- All components of Business Wealth Builder plan as needed
- Advanced benefits review, including owner, key person, and employee offerings/plans
- Buy/sell needs analysis & recommendations
- Executive bonus plan needs analysis & recommendations
- Exit planning and wealth transfer strategy discussion



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