EVIE FINANCIAL

PRICING GUIDE

for Individuals & Families

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

Wealth Builder

$2500

Annual Fee

You get a full review of financial position, including:

- Debt
- Savings
- Investments
- Retirement goals and progress
- Cash flow/budgeting
- Insurance (life, disability, and long-term care)
- One full review meeting per year
- Periodic accountability emails or virtual meetings
- Financial wellness education and coaching

Wealth Accumulator

$3500

Annual Fee

You get a full review of financial position, including:

- Every component of the Wealth Builder plan, plus:
- Access to personal budgeting tool
- Retirement income & distribution planning
- Employer-sponsored plan allocation
- Access to a personalized financial planning platform
- One in-person review meeting per year
- Periodic accountability call or virtual meetings

Most Popular!

Wealth Manager

$5000

Annual Fee

You get strategic analysis and recommendations, including:

- Every component of the Wealth Accumulator plan, plus:
- Social Security analysis and optimization
- Philanthropic planning/charitable giving strategy session
- Estate analysis
- Medicare/health care insurance analysis and recommendations
- Two in-person meetings per year
- Periodic accountability calls or virtual meetings

Generational Wealth Builder

$7500

Annual Fee

Your family unit gets guided discussions about financial legacy planning, including:

- Full review of financial position for parents and their adult children
- Recommendations and implementation steps for building and maintaining generational wealth
- Review of estate planning strategies for generational wealth transfer
- Individual check-ins with parent(s) and adult children separately as needed, including the components of Wealth Accumulator plan
- Periodic accountability calls or virtual meetings

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Installment payments are available for each plan tier

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