Explore your capabilities

CAPABLEWEALTH

SERVICE GUIDE

HI, I'M JARED

I'M EXCITED YOU'VE TAKEN THIS FIRST STEP ON YOUR FINANCIAL JOURNEY

Financial planning isn't an event; it's a journey toward something better! I'm so glad you're interested in taking that journey with Capable Wealth. We offer two main levels of service, which you'll find detailed in the following pages. Our services have been specificially crafted to assist young physicians and dentists in the early stages of their careers. These groups have traditionally been underserved by the financial planning industry because you haven't amassed great amounts of wealth yet. But that doesn't mean your needs are any less important. In fact, they may never be more important than they are right now.

Onwards,

Jared

Comprehensive Financial Planning

Starting at $595/month with an up-front fee of $2,500

Each client that partakes in comprehensive financial planning will receive a unique experience, tailored to their needs. Over the course of several meetings we will set out a vision of what you want most in life, and create a plan of how to achieve that vision. It begins by defining your personal vision for your dream life. This may sound daunting if you've never gone through this type of exercise, but don't worry, we will help you along every step of the way.

Next we work toward creating a picture of your current situation, establishing and prioritizing actionable items that will help you begin to build toward your dream life. The key is to create a road map that provides a clear path toward achieving what is possible. As we make progress we will continue to monitor and adjust as your situation changes; maintaining forward momentum and keeping you on target.

Areas We Will Cover:

- Lifestyle and Career Goals Design
- Budgeting and Cash-Flow Analysis
- Student Loan Analysis and Repayment Plan
- Home Purchase Assistance
- Debt Management Analysis and Strategy Planning
- StrengthsFinder Assessment and Coaching Session
- Retirement projections and planning
- Tax Strategies
- Family Planning
- Creating a Net-Wealth Statement
- Net-Wealth Tracking
- Account Aggregation
- Investment Management
- Creation of Family Map
- Insurance Analysis and Protection Planning
- Credit Score Review and Improvement Plan
- Saving for College
- Estate Planning Coordination
- Goals Planning and Analysis
- Salary Benchmarking and Negotiation Coaching
- Real Estate Investment Coaching
- Business Entity Analysis for Business Owners
- Workplace Benefits Analysis and Optimization
- Purchase a Practice
- Coordination with Key Contacts
- Beneficiary Audits
- Identity Theft Prevention Education

The Capable Wealth Process

STEP #1

Free Introductory Meeting: Getting Acquainted And Getting Excited!

Interested in connecting? We can spend some time getting to know each other to make sure we are a good fit. This is a journey we'll be on together, so we have to make sure we're both excited to work with each other before we begin.

STEP #2

First Official Meeting: The First Step On Your New Journey

What prompted you to take this next step? What do you want to accomplish? What does "success" look like to you? We will gather all of the relevant info necessary to build out the roadmap to your dream life.

STEP #3

Getting Organized And Gaining Clarity

If you're like most people, you have a bunch of accounts, forms, and info scattered around in different places. We'll pull together all of your info to get organized and provide a picture of your current situation.

STEP #4

Brainstorming and Planning

I will take all we have discussed and build your roadmap. Once we have a good vision we will pick specific action steps that we can begin taking. To help make the process manageable, no more than 1-3 tasks are chosen at a time.

STEP #5

Staying Accountable And Making Adjustments

As we take care of action items, we will replace them with new items, helping to keep the process moving forward. Life will change. Whether you are transitioning jobs, getting married, or even having a baby, we need to be prepared to make adjustments along the way. These adjustments ARE the financial planning process. It's a journey, not a one-time meeting.

Quick-Start Meeting

Cost: $495

Interested in engaging with us and working on 1-2 pressing needs? You can sign up for a 90 minute quick-start meeting designed to provide you solutions to the biggest problems that are currently keeping you up at night.

During this meeting you will be able to have an open discussion about the most pressing topics in your life that you are interested in working through.

After the meeting you'll come away with answers to the difficult questions you have. You will also receive a summary analysis of the situation with a detailed assessment and recommended action steps.

Start exploring your capabilities today! Book your free 30-minute discovery session so that we can begin your financial journey.

BOOK NOW

CAPABLEWEALTH

www.capablewealth.com | jared@capablewealth.com | @capablewealth