Financial Planning and Investment Advisory Services

COVENANT
WEALTH ADVISORS

	Financial Planning *(One-time plan)* *Get a one-time financial plan and implement the recommendations on your own.*	Wealth Management *(Planning + Investing+Relationship)* *Get continuous financial planning, turn-key investment management, and a long-term relationship to keep you on track.*
Communication and Advice		
Semi-Annual Reviews		✓
Advisor Access Anytime		✓
Quarterly Progress Calls		✓
Account Aggregation		✓
Account Servicing		✓
Education (webinars and videos)	✓	✓
Financial Planning		
Goals Identification and Prioritization	✓	✓
Retirement Planning and Roth Conversion Analysis	✓	✓
Social Security Analysis	✓	✓
Investment Analysis and Selection	✓	✓
Retirement Cash Flow Projections	✓	✓
Life, Disability, and Long-Term Care Insurance Assessment	✓	✓
Charitable Giving Strategies	✓	✓
Debt and Liability Analysis	✓	✓
Employer Benefits Advice (401k, HSA, Health)	✓	✓
Pension, Stock Options, and Deferred Compensation Advice	✓	✓
Net Worth Tracking	✓	✓
College Planning	✓	✓
Coordination of Estate Planning		✓
Collaboration with CPA or Tax Expert		✓
Tax Planning and Projections	Included	✓
Investment Management		
Adherence to Evidence-Based Investment Approach		✓
Investment Portfolio Asset Allocation and Location		✓
Portfolio Rebalancing and Tax Loss Harvesting		✓
Institutional Investment Access		✓
Tax Mitigation and Management		✓
Portfolio Income Management		✓
Portfolio Monitoring and Performance Reporting		✓
Pricing	**$5,500** *One-time fee.*	**0.40 - 1.00% of Assets Under Management** *We charge 1% per year or less of assets under management for assets over $1 MM.*

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COVENANTWEALTHADVISORS.COM