

## Services & Pricing



The initial consultation fee of **\$75** is applied as a full credit toward any package purchased at the same session. Military, veteran, and active duty households receive **10% off** all packages with valid ID or DD-214.

### ■ CONSULTATION

SERVICE	DURATION	PRICE	NOTES
Initial Consultation	60 min	<b>\$75</b>	Applied as credit toward same-day package purchase
Follow-up Session	30 min	<b>\$45</b>	For existing clients between monthly reviews

### ■ ONE-TIME PACKAGES

A complete financial snapshot with no ongoing commitment required.

#### Clarity Starter

**\$199**

One-time · No commitment

- Transaction consolidation & categorization — 1 full year
- Income & expense statement — annual + 12 monthly breakdowns
- 13-page branded PDF report delivered to your inbox
- Up to 5 bank and card accounts included

#### Budget Blueprint

**\$299**

One-time · No commitment

- Everything in Clarity Starter
- Personalized monthly budget creation based on real spending
- Category targets tailored to your household
- Recommended budget summary PDF

## ■ Full Financial Picture - Most Popular

**\$449**

One-time · No commitment

- Everything in Budget Blueprint
- Debt analysis and strategic payoff plan
- Financial goals setup with timeline and targets
- Client planning forms completed together
- Initial consultation included

## Complete Onboarding - Best Value

**\$599**

One-time · No commitment

- Everything in Full Financial Picture
- Power BI interactive dashboard setup
- Monthly statement generator configured for your household
- Onboarding call and full setup walkthrough

## ■ MONTHLY RETAINER PACKAGES

Ongoing monthly service with regular deliverables, coaching, and accountability. Cancel anytime.

### Statement Plan

**\$99**

per month · cancel anytime

- Monthly income & expense statement
- Transaction categorization updated every month
- 13-page branded PDF delivered to your inbox
- Up to 5 bank and card accounts

## ■ Budget Coach - Most Popular

**\$149**

per month · cancel anytime

- Everything in Statement Plan
- Monthly budget status report — actual vs targets
- Goals status update each month
- Debt payoff progress tracking
- One 30-minute monthly review session included

## Full Advisor

**\$249**

per month · cancel anytime

- Everything in Budget Coach
- Behavioral coaching and habit tracking
- Monthly debt tracker update with payoff projections
- Unlimited email support
- Quarterly deep-dive session — 60 minutes

## Premium Household · Best for Families

**\$349**

per month · cancel anytime

- Everything in Full Advisor
- Multiple account holders — spouse or partner included
- Custom Power BI interactive dashboard
- Priority turnaround — 48-hour delivery guarantee
- Quarterly financial review report

## ■ ADD-ONS & ENHANCEMENTS

ADD-ON	PRICE	DESCRIPTION
<b>Additional Account</b>	<b>\$15/mo</b>	Per bank or credit card account beyond 5 included
<b>Historical Cleanup</b>	<b>\$149</b>	Categorize and report on a prior year of transactions
<b>Extra Review Session</b>	<b>\$45</b>	30-minute add-on session outside your regular schedule
<b>Debt Payoff Plan Only</b>	<b>\$99</b>	Standalone one-time debt analysis and strategic payoff plan
<b>Emergency Fund Plan</b>	<b>\$49</b>	Standalone savings plan with monthly contribution targets
<b>Power BI Dashboard</b>	<b>\$149</b>	One-time setup of interactive household financial dashboard
<b>Expedited Turnaround</b>	<b>\$50</b>	24-hour delivery on any statement or report cycle

## MILITARY & VETERAN DISCOUNT

10% off any package · Active duty, veterans, and surviving spouses · Verify with military ID or DD-214

As a retired military household ourselves, we are honored to serve those who have served.

## RECOMMENDED STARTING POINTS

Most new clients start with a one-time package to get a full picture of their finances, then move to an ongoing retainer for monthly accountability and deliverables.

- Most new clients — Full Financial Picture (\$449) to get started, then Budget Coach (\$149/mo) ongoing
- Debt-focused clients — Full Financial Picture + Full Advisor (\$249/mo)
- Statements only — Statement Plan (\$99/mo)
- Military households — Full Advisor (\$249/mo) with 10% discount = \$224/mo