

# HARRIS FINANCIAL *Consulting* PLLC

Introducing

*FinPlans*

FINANCIAL PLANNING ACCOUNTS  
FOR PERSONAL RETAIL CLIENTS

## FinPlan Basic

- No annual income minimums or limits\*
- One-time set-up fee of \$500
- Monthly membership of \$50 (12-month commitment)

### FinPlan Basic Includes:

- **Basic Financial Plan** - Financial advice and planning for:
  - Household Budget
  - Debt Solutions
  - Emergency Savings
  - Financial Goals
- **Quarterly Reviews & Annual Financial Plan Updates**
- **Access to Financial Planner**

\*FinPlan & FinPlan Plus are Recommended for Clients with:

- Annual Household Income up to \$125,000 and/or
- Annual Investable Assets up to \$12,000 and/or
- Current Portfolio Value up to \$50,000

WWW.HARRISFIN.COM

*Change Your Legacy.*

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