

HARRIS FINANCIAL *Consulting* PLLC

Introducing

FinPlans

FINANCIAL PLANNING ACCOUNTS
FOR PERSONAL RETAIL CLIENTS

FinPlan Plus

- No annual income minimums or limits*
- One-time set-up fee of \$500
- Monthly membership of \$100 (12-month commitment)

FinPlan Plus Includes all FinPlan Basic Features, PLUS:

- **Upgrade to Comprehensive Financial Plan**
- **Access to Investment Advisor**
- **Select no-load, no-fee Mutual Funds and fractional equity shares**
- **Customized investing plan and automatic recurring transactions**
- **Personalized client dashboard for investment accounts**
- **Self-directed investment accounts for:**
 - Retirement
 - Education/ Custodial/ Minor
 - Savings & Wealth Building

WWW.HARRISFIN.COM

Change Your Legacy.

832-738-7596

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www.harrisfin.com

*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