



Personal Finance Coaching - Subscription Models

“Clarity”: Find focus. Gain peace of mind.

For those who seek general financial guidance and relief from financial stress

\$175/mo with a one-time \$100 fee for an Initial Planning and Strategy Assessment

Unlimited 30-min sessions

Unlimited email inquiries (48-72hr response)

“Balance”: Achieve stability. Align your money with your values.

For those who seek better personal finance systems and processes

\$275/mo

1 monthly 60-min session and Unlimited 30-min sessions

Unlimited priority email inquiries (less than 24hr response)

“Flourish”: Live with confidence. Thrive in every area of your financial life.

For those who seek the high-touch support needed to pursue ambitious financial goals

\$400/mo

2 monthly 60-min sessions and Unlimited 30-min sessions

Unlimited priority email inquiries (less than 24hr response)

1 FREE 30-min session for a family member, friend, or colleague

No long-term commitment required. Cancel anytime.*

*If cancelled in the middle of a billing cycle, no portion of the previously paid month will be reimbursed.