

Step ②

Choose Your Ongoing Plan

Proactive Financial Solutions 360, LLC

www.pfs360llc.com

Financial Planning & Advisory Services



Annual Financial Plan update meeting that includes review of your asset allocation.



On-going support related to your personal finances.



Access to a secure client portal where your financial plan is safely stored and accessible. You can also upload other important financial, estate and tax documents.



Weekly investment/market newsletter.



Investment guidance during our financial plan update meetings.



Additional Comprehensive Financial Plan update meeting, that includes re-assessment and review of your asset allocation.



Continual investment advice via phone, email and during our annual meetings.



Investment management provided in-house.



**Core plan also includes a 30 minute Check-In meeting to discuss progress on planning goals.*

***Core and Premium plans do not include implementation of investment advice.*