Partners for Planning, LLC

Fee-Only Financial Planning and Investment Advisory Services

Fee-only, tax-savvy advice tailored to your personal circumstances. We are especially geared toward people who are tired of mass-market advice that does not fit their situation. Need another perspective or second opinion? Let us help.

Targeted Tax and Financial Consultation

Step by Step to Unbiased Advice

Schedule Appointment

Complete agenda form. Schedule appointment. Email if you have a question.

Gather Information

We will request information you should have available for your appointment.

Consultation

Meeting in person, by phone or web conference. After the meeting, we follow up to be sure you are clear about the advice given.

What happens next? You are eligible to participate in our Inner Circle Program. Advice and support for one year in the way most convenient to you—email, phone, web conference or in person. (Tax preparation services are available to Inner Circle clients.)

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Who can benefit? Those who have a few questions in one or two areas and want to start a planning relationship. This is a limited-scope project. If you have questions on more than one or two areas ask about a financial plan.

Examples:

- Am I saving enough? (For pre-retirees.) Am I spending too much? (For retirees.) Get an estimate to determine if your current savings are roughly what you need.
- My 401K offers a limited menu of indexed mutual funds. How should I allocate my workplace account?
- I am starting a small consulting business and need start-up information about finances, tax deductions and keeping records.
- I am refinancing and want to choose the right mortgage for my situation. Or, should I pay off my mortgage?
- Will new changes in the tax law affect me?

What is included? Professional, personalized advice at your convenience. One 90-minute meeting in person, by phone or web conference to get answers to your questions plus follow-up so you are clear about the advice given. Receive partial credit if you step up to planning project within 30 days. Service Fee $595.

Questions? Send an email and we will let you know if we think your agenda can fit into this limited-scope project.

Partners for Planning, LLC

Targeted Tax and Financial Consultation

Client(s) ____ Date______________

Email __________________________________

Phone # and best times if we need to contact you. ______________________________________

Preferred Location _________________________ or via web conference __________

Please take a few moments to tell us your agenda so we can spend time on your specific concerns and effectively use our time. We will be in touch to let you know what information to have available for the consultation.

Topic 1 – Your question.

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What other information will we need to know?____

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Topic 2 – Your question.

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What other information will we need to know?____

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What is your effective tax bracket: (circle one)

10%	15%	25%	28%	33%	35%	39.6%	Not Sure

Did you pay Alternative Minimum Tax? (See page 2 of your Federal tax return or Form 8582. Or, bring your tax return.) We will need for the meeting, at a minimum, the first 2 pages of your tax return and Schedule A, Itemized Deductions or a tax return summary for any issue that has tax implications.

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Scan and email: mferrari@partnersforplanning.com or visit the website, Targeted Consultation page, and fill in and enter your information to send directly from website.