

Which Service Is Right For Me?



All new Soesbe Financial clients begin with a Discovery Meeting.



Discovery Meeting

Discovery is how we get to know a client's unique circumstances, needs, and goals. All new clients start their relationship with Soesbe Financial here, and *the type of engagement is determined using this process*. We mutually agree on the scope, sign a contract and get to work.



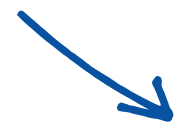
Standalone Financial Planning

Includes retirement planning as required by client: basic retirement, investment recommendations, tax planning, risk management and insurance analysis, estate and charitable giving planning.



Integrated Management Services

Includes personalized portfolio management, financial planning, notary service, and personal tax preparation for clients that qualify. Any SFP fees already paid are refunded.



Focused Financial Advice

Hourly consultation on a specific topic. No planning work.



Engagement Concludes

