Soesbe FINANCIAL

Which Service Is Right For Me?

Start

All new Soesbe Financial clients begin with a Discovery Meeting.

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.

SFP

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.

optional

IMS

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.

FFA

Focused Financial Advice
Hourly consultation on a specific topic. No planning work.

Finish

Engagement Concludes