



## WITH our Ongoing Advisory Service

- ✓ **Access to our financial planning tools**, such as insurance, wealth management, and real estate strategies, as well as annual reviews of opened accounts
- ✓ **Continual access to your Econologics<sup>®</sup> Financial Advisor** with scheduled calls to assist and guide you with your financial planning needs
- ✓ **Econologics<sup>®</sup> Annual Road Map Renovation Plan<sup>®</sup>**: a complete re-write of your Econologics Road Map Financial Plan, which includes your updated Econometry Analytics, investment review, debt strategies, tax strategies and more.
- ✓ **eMoney Online Financial Organizer** personal dashboard
- ✓ **Econologics<sup>®</sup> Practice Exit & Wealth Management Plan<sup>™</sup>** (available to active clients at time of practice sale)
- ✓ **Special pricing** for Econologics<sup>®</sup> Prime Clients on future events and discounts on additional services
- ✓ **Exclusive website** for Econologics Prime Clients

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- ✗ **Econologics<sup>®</sup> Annual Road Map Renovation Plan<sup>®</sup>**
- ✗ **eMoney Online Financial Organizer**
- ✗ **Econologics<sup>®</sup> Practice Exit & Wealth Management Plan<sup>™</sup>**
- ✗ **Special pricing on events and services**
- ✗ **Exclusive website**

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# Econologics Ongoing Advisory Service

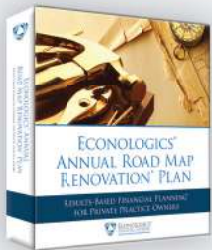
## Advance to the Next Level

Progress can stall without an advisor. Circumstances and goals can change over time and so do opportunities. Planning for your financial future isn't a set-it and forget-it task. Advance to the next level by receiving ongoing guidance and accountability from your advisor and have your plan updated each year.

**Econologics® Prime Clients** enjoy a multitude of benefits beyond the typical client-advisor relationship. The purpose is to provide ongoing resources for continuing education, continuous planning advice and implementation, advanced planning strategies, as well as information on current financial topics and economic events as they relate to practice owners.

## As an Econologics® Prime Client you will receive our ongoing advisory service with exclusive benefits that include:

- **Access to your Econologics Financial Advisor**
  - Accountability calls
  - Review of financial programs and financial checklists
  - Review of key financial metrics
  - Review of wealth building strategies and progress
  - Review of transition strategies
- **Econologics® Annual Road Map Renovation Financial® Plan**
  - Debt reduction strategies
  - Insurance evaluation
  - Tax minimization strategies
  - Future income needs analysis
  - Periodic re-appraisal on your practice (if your original plan included an appraisal)
- **eMoney Personal Financial Organizer**
- **Econologics® Practice Exit & Wealth Management Plan™**: A proprietary exit and wealth management plan that analyzes a practice sale offer and projects income streams using multiple wealth management resources *(available at no additional cost to certain active clients at time of practice sale)*
- **Special pricing** for Econologics® Prime Clients on future events and discounts on additional services
- **Exclusive website** for Econologics® Prime Clients with digital access to recorded event presentations, booklets, books, articles, and more



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