

FINANCIAL WEALTH PLAN



As your trusted partner we provide personalized financial guidance as we coach, mentor and inspire you every step of the way to live life to the fullest

FINANCIAL PLAN

For the individual or family who...

Wants direction, support and a financial plan. To know when you can retire, purchase the things you would like, take trips, or leave a legacy. We will give you a financial plan that includes everything from:

- Cash flow
- Budgets
- Insurance analysis protection
- Estate planning
- Investment analysis
- College education projection
- Retirement planning and projection
- Tax advantaged investing analysis

Est. One Time Cost: \$2,000-\$5,000

FINANCIAL BUSINESS PLAN

For the business owner who...

Wants help creating a succession plan for your business along with looking at your personal situation. You will receive the Prosperwell Financial Plan plus, we will help you create and facilitate a succession plan for your business. Including:

- Estate Planning
- Legacy Planning
- Retirement Planning
- Investment Banking

We will look at your personal and business assets to develop a plan for you.

Est. One Time Cost: \$10,000

DIVORCE FINANCIAL PLANNING

For the individual that needs guidance with their money in the divorce process. This can include:

- Balance Sheet
- Budget & Cash Flow
- Division of Assets
- Calculations of Child Support
- Options for Spousal Maintenance
- 24-hour access to Nicole N. Middendorf, CDFA
- Organization of all assets and documents
- Coordination with Family Law Attorneys, mediators, CPAs, and mortgage brokers
- Divorce Decree Analysis

Est. One Time Cost: \$5,000

We will start by discovering your passion and then create your personalized analysis. During your complimentary initial consultation, we discuss your dreams, goals, and desires. We then develop a personalized strategy and plan and put it in action.

Contact us at info@prosperwell.com or call us at 763-231-9570 to get started with your financial plan.

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. Prosperwell Financial is not a registered broker/dealer, and is independent of Raymond James Financial Services.

The Financial Planning or Consulting services listed are generally those offered under the Wealth Advisory Services Agreement. However, fees and services are customized with each client agreement. For a complete list of fees and available services, please consult the most current Form ADV Part 2A and the Wealth Advisory Services Agreement that you may obtain from your Investment Advisor Representative.

Under this Agreement there are two offering options:

Financial Planning: services may include the following (full list & descriptions found on Form 3010 - Schedule A), Financial Planning, Tax Planning, Insurance Planning, Education Planning

Investment Consulting Services: specifically used for investments portfolios held outside of Raymond James. Services may include the following (full list & descriptions found on Form 3010 - Schedule B), Portfolio Holdings Review, Asset Allocation Review, Securities/Investment Research

Prosperwell Financial

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