SFG | SCARBROUGH FINANCIAL GROUP, LLC

Summary of Planning Services

Retirement Income Projection **$ 2000**

- Asset Distribution by Asset Class and Tax Category
- Tax and Inflation Analysis
- Integration of Employee Benefits
- Social Security Election
- Accumulation Strategies
- Distribution Options
- Monte Carlo Simulation
- Hypothetical Scenario Analysis

Summary & Recommendations **Included**

Investment Analysis (up to five accounts) **$ 1000**

- Current Portfolio Allocation by Asset Class
- Sector Weighting
- Overlap Analysis
- Back-tested Performance
- Risk-assessment
- Proposed Reallocation

Investment Risk Assessment **Included**

***Basic Plan** **$ 3000**

Additional Modules: (available in *addition* to basic plan)

Estate Planning
(In Conjunction with Our In-House Estate Planning Council on Retainer, As Needed) **$ 1000**

- Asset Ownership
- Titling and Beneficiary Designations
- Planning Strategies: Gifting & Wealth Transfer

Education Plan **$ 500**

- Projected Cost Estimate
- Source of Funds

Insurance Review **$ 500**

- Life, Long Term Care, Disability

***subject to revision based on complexity**