

Financial Planning Offering, Services, & Pricing

	OFFERING	GUIDE PLAN	TRACKER PLAN
	Financial Freedom Score	✓	✓
	Financial Freedom Trail Map	✓	✓
	Access to AllGen Academy	✓	✓
	Financial Planning Tools and Calculators	✓	✓
	Live Workshops	✓	✓
	Advice and Plan Given By	Advisor	Advisor + Financial Planner
	Employer Retirement Account Allocation (401k, 403b, etc.)	✓	✓
	Initial In-Person Financial Planning Meeting	Up to 1.5 Hours	Up to 3 Hours
	Annual In-Person Financial Planning Reviews	Up to 1 Hour	Up to 2 Hours
	Quarterly Goal Check-Ins	Via Email	Client Preference
	Wealth Tracker Personal Software		✓
	Digital Vault		✓
	Multiple Source Integration (SS, Pensions, Real Estate, etc.)		✓
	Account Aggregation		✓
	Real-Time Net Worth Monitoring of All Assets and Liabilities		✓
	Real-Time Budget Tracking		✓
	Monte Carlo Analysis		✓
ANNUAL OPTION	Year 1 (Includes Initial Plan Fee)	\$800	\$2,000
	Ongoing Planning Fees (Starts Year 2)	\$400	\$1,000
MONTHLY OPTION	Month 1 (Includes Initial Plan Fee)	\$436	\$1,090
	Ongoing Planning Fees (Starts Month 2)	\$36	\$90
	Initial Plan Fee	\$400	\$1,000
	Minimum AUM for Ongoing Planning Fees Waived	\$100,000	\$250,000

AllGen Financial Advisors, Inc. is registered with the U.S. Securities and Exchange Commission (SEC) as a Registered Investment Advisor. This presentation is limited to the dissemination of general information on the advisor's pricing and service offerings, and provides a means by which a prospective client may engage AllGen Financial Advisors, Inc. Personalized advice may only be given after the delivery of a disclosure statement, the execution of an investment advisory and/or financial planning contract by the client and the advisor, and the initial payment of the planning fee or investment advisory fee by the client to the advisor.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP[®], CERTIFIED FINANCIAL PLANNER[™] and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

