Hillebrand Financial Planning, LLC

Transition Financial Plans & Fee Only Investment Advice

HILLEBRAND
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Get Acquainted (No Cost)	If our services appear to fit your needs over the phone, we will schedule a **no cost, no-obligation** Get Acquainted Meeting in person or by phone, and provide you with additional information to help you learn more. **You are in complete control of your services & costs**.
Gather Documents	When you hire Hillebrand, you will need to gather the requested data and then possibly complete a risk tolerance questionnaire provided by us. This information will need to be provided to us before your next meeting.
Goal Setting Workshop	This meeting is another opportunity for you to clarify your current situation, financial goals and objectives, and to discuss any additional questions and concerns. During this meeting, we develop the goals that serve as the epicenter of our client/advisor relationship.
Financial Assessment **Investment Planning** **Retirement Planning** **Risk Management** **Estate Planning**	During this stage of the process, we complete a comprehensive financial analysis of the information & goals that you have provided and study various plan scenarios. We conclude our research and analysis, and produce the final reports that include observations, assumptions, specific recommendations, and an action plan for your unique situation. You are in complete control of your services & costs. NAPFA THE NATIONAL ASSOCIATION OF PERSONAL FINANCIAL ADVISORS
Final Plan Review	After completing a comprehensive financial analysis & a statement of advice for each area of your financial life that you have hired us for, you will receive your final plan, complete with a thorough review.
Revise & Refine	This is an on-your-own post planning opportunity after the final plan is complete, to review your plan to make sure that you understand all of the recommendations made. During this time you are expected to make a list of questions & concerns about the advice given for later discussion.
3 Week Follow-Up	This phone meeting is a short complimentary 30 minute follow-up initiated by you at a time when you are ready, to ask questions about your plan. During this meeting, we can discuss a plan for follow-up and implementation assistance that you require going forward.