LevelUp
POWERED BY AboundWealth

Why LevelUp?

Personal finance is personal. Reaching your financial goals isn't just about getting there. It's about getting there with confidence along the way, knowing you're on the right track.

LevelUp helps bring confidence to your financial plan and accelerates progress toward your goals. Whether you're building wealth, seeking financial independence, or planning for the future, you'll receive a step-by-step roadmap that factors in your unique financial situation.

This partnership helps your strategy level up as your life changes, providing clear direction and guidance before you're ready for the next level with Abound Wealth. You'll always understand where your money is working and discover strategies to make it work harder.

Together, we can maximize your opportunities while in the building phase. We want to create a plan that helps you level up your financial life, ensuring you're well on your way towards your more beautiful tomorrow.

Who it's for

- Parents and couples work with us to plan for a secure financial future together
- Rising professionals partner with us to build wealth and optimize cash flow
- Employees with equity compensation rely on us to maximize stock options and RSUs
- Real estate or business owners trust us for strategic planning of complex finances



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Topics covered

Goal Setting

- Prioritize your goals, values, and dreams to create a clear vision
- Determine the ideal timeline and feasibility of each priority

Cash Flow Analysis

- Review historical expense and income trends
- Create a spending plan for the year ahead
- Maximize your rate of return on cash
- Build an emergency fund and plan for large expenses

Equity Compensation

- Optimize your RSU/ESPP strategy through a personalized schedule that maximizes value
- Navigate complex stock options with tax-efficient plans for your NSOs and ISOs
- Get tax projections to minimize tax burden when selling

Real Estate Planning

- Home purchase affordability analysis
- “Keep vs. Sell” analysis of your current home based on your holistic financial picture
- Analyze investment properties to evaluate potential acquisitions for growth and returns
- Boost rental property income by identifying strategies to increase profitability

Tax Planning

- Maximize tax-advantaged accounts for optimal growth
- Identify potential deductions and credits (including reviewing prior years’ filings)
- Strategically use tax-loss harvesting to keep more money working toward your goals

Investments

- Education and recommendations for investing based on your experience level
- Detailed review of your current portfolio and asset allocation
- Risk tolerance alignment with strategic investment selections
- Diversification strategies for concentrated positions

Retirement Savings

- Optimize 401(k) and IRA strategies to maximize savings
- Determine how much to save for your ideal retirement or financial independence
- Consolidate retirement assets and accounts to work cohesively together

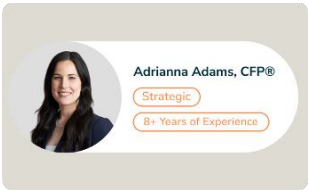
Education Savings

- Calculate funding goals for different college scenarios (i.e. private, public, in-state, out-of-state)
- Choose the best type of account to fund education goals

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How does it work?



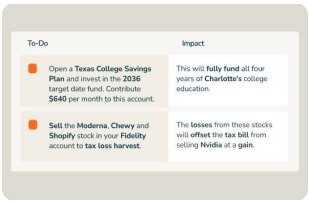
Step 1: Advisor Intro and Intake Meetings

Get matched with your dedicated CFP® professional. Upload your financial documents through our secure portal. Then have a 60-minute intake meeting to align on your key goals, priorities, and identity any missing information that we'll need to do your analysis.



Step 2: Tailored Plan Creation

Your Advisor analyzes all aspects of your financial life to develop a customized financial model and a step-by-step roadmap to help reach each one of your goals.



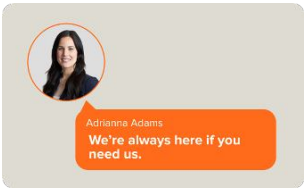
Step 3: Plan Delivery

Your Advisor reviews your plan with you in a 90-minute delivery session. Understand your plan, get all your questions answered, and know the specific actions to take afterward.



Step 4: Implementation Coaching

Get a 60-minute, one-on-one Coaching session with your dedicated Advisor to start completing your plan's action items.



Step 5: Ongoing Dedicated CFP® Professional Support

Get 2 additional 60-minute Coaching sessions and unlimited email support with your CFP® professional throughout the remainder of the year.

Year 2 and beyond: Next year we'll update your financial plan, track goal progress, adjust your investment portfolio, and advise you on any new decisions that are too important to handle alone.

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What you get

Year 1: Building Your Foundation

- **60-minute Intake Session:**
  To understand your goals, values, and priorities.
- **Written Financial Plan with action items:**
  A detailed 8-10 page analysis of your three most important financial goals, with an actionable checklist to keep you on track.
- **Custom Financial Model:**
  A benchmark for tracking net worth, understanding cash flow, creating your ideal spending plan, tax planning, and consolidating all investments.
- **90-minute Plan Delivery meeting:**
  Dig into our findings and recommendations.
- **Three 60-minute Coaching Sessions:**
  Your CFP® professional will help you implement action items and provide support for any bigger financial questions or decisions that arise throughout your first year.
- **Unlimited Email Messaging:**
  Get answers to smaller questions about your plan.

Years 2+: Ongoing Guidance

- **Annual Plan Update and Goal Tracking:**
  Track progress and plan for the coming year. Get new action items to keep you moving forward and ensure every part of your plan is optimized.
- **Updated Financial Model:**
  Update net worth, cash flow, and any detailed analysis done for tax and equity compensation planning.
- **Annual Investment Portfolio review:**
  Tailored recommendations with advanced diversification and risk management strategies.
- **Three 60-minute Coaching Sessions:**
  Receive three sessions annually to ensure ongoing strategic growth and financial planning.
- **Unlimited email support:**
  For day-to-day questions throughout the year, with a focus on strategic decision-making.

Curious on what a plan looks like?
See our sample plan here.

SEE OUR SAMPLE PLAN

Your Dedicated CFP® Professional



Your CFP® professional becomes your trusted financial partner. Your financial goals will change, and your financial plan should grow with you.

We're here to guide you through big financial decisions—whether it's retirement planning, maximizing equity compensation, or growing your wealth.

Think of us as your financial partner, in your corner as you level up.

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Pricing

We believe in clear, upfront pricing so you know exactly what to expect.

LevelUp Membership

Covers the development of your Strategic Financial Plan, personalized strategy, and continuing expert guidance with annual plan updates and coaching.

$5,200

Renews at $4,200



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