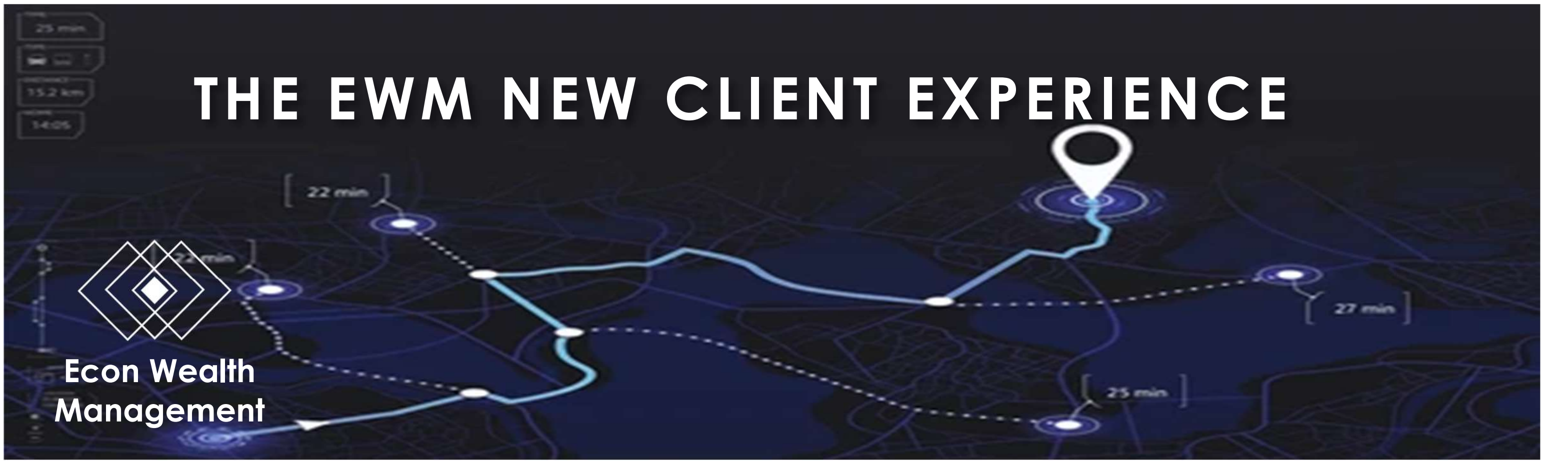

ONBOARDING

Client Portal Access

Information Gathering

◇

Risk Assessment

Signatures

◇

Account Openings

Transfer of Assets

WHAT TO EXPECT NEXT!

With Econ Wealth, you're with a team where someone you know will answer the phone, be available, help you with household chores (seriously!), and create a customized financial experience for you, then Econ Wealth Management may be exactly what you're looking for. As a **FIDUCIARY**, our goal is to provide you with the peace of mind you deserve while being your guide on the journey to your goals and dreams. You will expereience the highest level of service from our team during your lifetime as a client.

INVESTMENT STRATEGY

Investment Goals

Investment Planning

◇

Income Needs

◇

Verify Risk

Econ Wealth Management

4755 Linglestown Rd

Suite 204

Harrisburg, PA 17112

(717) 545-5870

Scan to view our website.

PLAN PRESENTATION

Retirement Projections & Plan Results

Portfolio Recommendations

◇

Coordinate with CFP® Professionals

Cash Flow Planning

◇

Meeting Schedule Presented

	Services	FOUNDATION	PATHWAY	PINNACLE
ENGAGE	Client Events	Large Group Events	Small Gatherings	Exclusive Events
	Operations Updates	Select	Annual Review	Custom Phone Call
	EconXChange Access	✓	✓	✓
	In Touch Communication	✓	✓	✓
	Client Portal Access	✓	✓	✓
	Full Service Team Support		✓	✓
	Stock Stories			✓
	Individualized Team Access			✓
INVEST	Active Asset Management	✓	✓	✓
	External Account(s) Review	✓	✓	✓
	Core ETFs	✓	✓	✓
	Individual Stocks	Optional	✓	✓
	Select Strategies		Need based	Plan Specific
	Tactical Holdings			✓
PLAN	Annual Reviews	Email/Phone	In-Person	Custom
	Personal Reports	Annual	Semi Annual	Quarterly
	Financial Plan	Allocation Plan	Goals Plan	Full Plan
	MoneyGuide Pro Access	Select	View Only	Full Access
	IRA Contribution Review	✓	✓	✓
	Capital Gains Update	✓	✓	✓
	Tax Planning	As needed	✓	✓
	Insurance Planning		Annual Review	Comprehensive
	Estate Planning		Annual Review	Comprehensive
	Cash Flow Planning			✓
	Tactical Review Call			✓