TIMOTHY L. GOOD

SERVICES & COSTS

I believe in developing expertly crafted, personally tailored strategies from a financial planning perspective. While building wealth and protecting against risk is important, I find the best way to achieve success is to understand exactly where you are and what you want to achieve in order to determine the best strategies to get you there. I believe everyone that goes through the financial planning process is empowered to make better financial decisions, significantly improving their potential for success.

COMPREHENSIVE FINANCIAL PLANNING

Services Offered

Good Life Planning

I. Cash Flow & Income for Life Planning
II. Insurance & Contingency Planning
III. Asset Management & Tax Planning
IV. Retirement & Financial Independence Planning
V. Estate & Legacy Planning

Client Service

- 3-6 Meetings to Develop Strategies
- Annual Review
- Implementation Meetings As Needed

Fees (vary based on complexity)

Initial Annual Fee

$1500 - $5000+

Ongoing Annual Fee

$300-600+

ADVISORY ASSET MANAGEMENT (AS FIDUCIARY)

Services Offered

Investment strategies tailored to your financial plan or for clients who only wish to receive advice related to their investments.

- Investment Advisory Services
- Portfolio Analysis & Reviews
- Any type of asset account from retirement accounts to trusts.

Annual Service Fee

1-2%* (fees may vary based on strategy, circumstances, and minimums)

*Reduced Fee Schedule for Tiers of Assets Under Management Starting at $1M+

OTHER FINANCIAL SERVICES

Services Offered

- Retirement Plan Rollover Specialist
- Life Insurance
- Long Term Care Solutions
- Brokerage Products
  - Stocks, Bonds ,ETFS, UITs, REITs, etc.
- Annuities
  - Fixed, Equity Indexed, Variable, Immediate
- 529 Plans
- 401(k) Management
- Alternative Investments
- Medicare Supplement & Advantage
- Small Business Services

Implementation Cost

Varies based on products and account types.