

You set the strategy. We build the plan.

Outsourced plan construction, updates and analysis for independent financial advisors.

SERVICES

DATA ENTRY ONLY

STARTING AT \$500

Client data entry, income and expense inputs, and account, asset and liability setup. No analysis or recommendations.

FOUNDATIONAL PLAN

STARTING AT \$1,000

Plan setup, data verification, one core scenario and baseline retirement projections for advisor review.

COMPREHENSIVE PLAN

STARTING AT \$1,500

Retirement and cash flow analysis, basic tax planning, investment review, insurance needs and estate considerations.

FINANCIAL PLAN UPDATES

QUOTED BY SCOPE

Refresh existing plans for annual reviews or life changes. Data, assumptions, projections and targeted analysis updated as needed; an executive summary or presentation is scoped separately.

CUSTOM PLANNING & ANALYSIS

\$150 / HOUR

Standalone scenario modeling, plan reviews and specialized analysis. Scope and estimated fees agreed upon before work begins.

OPTIONAL ADD-ONS

STARTING AT \$250

Roth conversions, Social Security, stock options, tax projections, additional scenarios, business and custom planning requests.

HOW IT WORKS

01 SUBMIT DATA & SCOPE

Share the existing plan, updated client data, goals and requested support.

02 BUILD & ANALYZE

We update or construct the plan, refresh assumptions and model scenarios.

03 ADVISOR REVIEW

You review projections, supporting observations and open questions.

04 REVISIONS

We incorporate agreed revisions and confirm the reporting needs.

05 FINALIZE

You receive updated planning files and agreed advisor-ready reports.

READY TO ADD PLANNING CAPACITY?

Flexible help for new plans, annual reviews and one-off analyses.



ABOUT THE FOUNDER



DAVID CAWLEY, CFP®

Founder

David is a Pittsburgh-based financial planner with a Finance and Accounting background from the University of Pittsburgh at Johnstown, where he was an Academic All-American and All-American wrestler.

PLANNING SOFTWARE

eMoney
Advisor

RightCapital

MoneyGuide

eMoney, RightCapital and MoneyGuide support, depending on the scope and complexity of the case.

WHAT COUNTS AS AN UPDATE?

A scoped refresh can be as simple as updating balances and assumptions, or include revised projections and additional planning analysis.

REPORTING IS FLEXIBLE

Update an existing executive summary or request a new advisor-ready report. Deliverables are agreed upon before work begins.

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