Charles P. Buck, CFP®
Buck Financial Advisors, LLC
"Helping You Determine Your Financial Future"

"Quick Start" Financial Planning

"Quick Start" is a working financial planning session. For those who have specific financial questions and concerns, or want a second opinion, but do not want the conflicts inherent in commission-based advice, this is ideal. For 2 hours you control the agenda. We will discuss your financial planning or investment concerns. It will be my job to give you as much information as I can during your session.

Obviously we cannot prepare an elaborate written financial plan during an introductory session and due to the time constraint, it is difficult to address more than one or two topics. However, this is ideal for those who have one or two financial concerns and need fast and accurate information.

When you call to make your appointment we can discuss if the "Quick Start" is right for you. On my website, you will find a "Confidential Questionnaire" I do ask that you download and fill it out and get it to me prior to the meeting. I will review your information, and concerns you want to address prior to your arrival. This way, will be ready to get immediately to work as soon as you arrive. "Quick Start" working session is exactly that - you and I get right down to business and arrive at workable solutions to your financial concern.

The cost of the "Quick Start" financial planning session is based on time; usually 2-3 hours, this includes the time we are working together, as well as, approximately one hour of preparation work and a written summary of recommendations. This session is priced at $595.

If you feel 2 hours isn't enough, or are interested in a more comprehensive financial plan, then we can schedule additional meeting(s) on an as needed basis.

Regardless of the level of service you need, call today for an appointment for help with your financial and investment planning.

Here are some examples of what we can do:

- Evaluation of your 401(k) Plan
- Investment Asset Allocation Review
- Retirement Cash Flow
- College Saving Plan
- Employee Stock Purchase Plan Analysis
- Employee Stock Option Analysis
- Mutual Fund & Investing Basics
- Review of Your Early Retirement Offer
- Discussion of Lump Sum vs. Lifetime Annuity
- IRA Required Minimum Distributions
- Tax Effect of Selling a Large Appreciated Asset
- Whatever You Want To Discuss

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