

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

Young Professional Financial Planning

What do you picture when you think of working with a financial planner? Lots of assets, high income, sophisticated financial issues? The truth is, the financial world is complicated, and everyone – including those just starting out – can use a helping hand. And so, we’ve designed a program just for you. “YFPF” is a financial planning working session designed for young individuals who are starting their financial journey, typically those under 35 years of age.

Generally we will cover items such as savings, spending, tax deferred plans, insurance, or any financial issues you wish to discuss. A typical agenda items include emergency fund, short term goals, longer term goals and savings. I can give you advice on your employer benefit plans, savings for a house, or the addition to your family. We discuss your insurance needs, and how to meet them while leaving you money to live.

You will receive advice tailored to your specific situation, without the inherent conflict of interest or pressure for product sales that may be present in commission-based advice.

Here’s how it works:

- First, call to discuss if the “YFPF” is right for your needs; if you decide it is then we will schedule an appointment.
- Next complete the “Confidential Questionnaire” located under the “Client Forms” tab of this website and send it to us in advance of our meeting. Pay specific attention to the section with comments on the advice you seek, which will be the framework for our discussion.
- Our appointment will be an active working session – be prepared to take notes. We will discuss your needs and develop workable solutions to your financial concerns.
- We’ll set up an appointment to meet again for a one hour update in 3 to 6 months.
- After completion of your appointment, I will write a summary of our discussion for your records and future reference. Obviously, we cannot prepare an elaborate written plan, but you can make informed decisions and start heading in the right direction.

Ongoing, you will receive our periodic newsletter, plus an occasional email with topics of interest to you. And it's a great advantage to have an advisor/coach who knows your situation to answer questions as you move through your career. With a coach, you make better choices to determine your financial future. When you're ready for a more detailed plan, we already know you and can help you identify the key areas of focus.

The cost of the Young Professional Financial Planning program is \$595, including the two meetings as well as time of preparation work and a written summary of recommendations. If your particular situation requires more complex planning, we can provide a more comprehensive financial plan, or 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.