

MARKET ◀ STREET

WEALTH MANAGEMENT ADVISORS

FOUNDATIONS

BY MARKET STREET

"The steps you take today lay the foundation for your tomorrow."

What is Financial Planning?

Financial planning is the art and science of helping you understand and optimize your money to reach your life goals.

The Foundations process of financial planning includes helping you paint a clear picture of where you are today, assisting you in finding where you want to go, and helping you to build a plan that will serve as a guide to your journey. Our Foundations program is designed specifically to help you create a Foundation for your tomorrow.

Why Foundations?

We understand the challenges and frustrations that your finances can have on your life. Everybody has dreams and aspirations; whether those are places you would like to go, things you would like to buy, people you would like to help, or experiences you would like to have. Often, these dreams and aspirations do not come to fruition as they keep getting pushed aside while other life events begin taking their place. Foundations is here to help you set forth a plan to fulfill these dreams.

Who We Serve

We work with time-strapped professionals on being intentional with their financial goals. Our process requires a mutually committed relationship between you and us. We believe the more engaged you are, the more you will benefit from our services.

How We Execute

The process starts by getting to know you. Let's grab coffee and just chat about you, your dreams and aspirations, and whether we are a good fit for you.

We serve as your trusted financial planners and accountability partners through a process of data gathering and analyzing fundamental financial data, clarifying goals, and developing and monitoring an actionable plan. We'll work with you to hash out steps to align your current needs with your future goals. As your plan evolves, we will help you monitor progress through annual accountability check-ins.



Our Services

As CERTIFIED FINANCIAL PLANNERS™ we are required to provide advice that is in your best interest. We do not sell you products, nor do we receive any compensation from referrals we make to attorneys, CPAs, insurance brokers, etc.

What You Get

- ▶ Access to a CFP® Professional
- ▶ Online financial data gathering questionnaire
- ▶ Annual 60-90 minute virtual meeting
- ▶ Annual one page financial snapshot with action steps
- ▶ Net worth progress tracker
- ▶ Investment advice and management
- ▶ Connections to other professionals (Attorneys, CPAs, etc.)

Our Fees

Our fee for Foundations is the greater of the following:

Quarterly fee of 0.25% on assets managed by
Market Street

-or-

Minimum quarterly fee of \$200



Typical Client Questions

- ▶ How does my financial Foundation stack up?
- ▶ Am I taking advantage of available tax strategies?
- ▶ Am I saving enough?
- ▶ Do I need life insurance or estate documents?
- ▶ My student loans are piling up. How should I handle these?
- ▶ What's the right investment strategy for me?
- ▶ Should I pay down debt or save for retirement?
- ▶ Which available employee benefits options should I enroll in?



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