Strategic Seasonal Planning

Tempus Advisory Group

Most will find themselves in need of guidance throughout the financial seasons of life. Little to no planning is likely to result in missed opportunities and unintended consequences. Seasonal planning forms the basis of the Tempus Advisory Group client relationship to organize, prioritize, and simplify your financial life. Our vision is to become the premier provider of financial advice and solutions. Our mission is to share our, expertise, techniques, and resources so clients may realize the joy and peace of mind that comes from true financial freedom!

Seasonal planning takes different forms, but is always aligned to one's financial season of life. Given the vast array of options in the financial services industry, most consumers become overwhelmed to the point of inaction. Tempus Advisory Group seeks to be your financial life partner to help you navigate the complexities and filter out the noise to determine the best strategies to help you accumulate, manage, and protect your wealth. Since each situation is unique, we provide personal one-on-one service to implement customized cost conscientious solutions with an emphasis on quality.

Strategic Seasonal Planning with Tempus Advisory Group is

Informative:	We will educate in simplified terms so you understand the process, strategies, and solutions.
Holistic:	We will complete a detailed accounting of all financial and family resources relative to emergency, retirement, protection, and legacy to develop your goals and recommend suitable strategies.
Transparent:	We will disclose all costs, benefits, and rationale for each component of your plan.
Effective:	We will take the lead and walk you through a step-by-step process delivered with personal one-on-one service to ensure your plan is implemented and review your progress to ensure you stay on track

Strategic Seasonal Planning Process with Tempus Advisory Group is

Step 1:	Personal one-on-one discovery meeting
Step 2:	Review each offering by level and select the appropriate areas of focus
Step 3:	Complete Comprehensive Financial Snapshot and Data Collection
Step 4:	Establish Financial Baseline
Step 5:	Analyze and Probability Test each area of focus and strategy
Step 6:	Strategy Analysis, Optimization, Probability Testing Alternatives
Step 7:	Recommendations, Implementation
Step 8:	Annual Goal Progression Analysis, Tracking, and Refinement

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Strategic Seasonal Planning Pricing by Strategy

Tempus Advisory Group

Pinnacle — $750 to $5,000

Designed to bring your financial tree to full bloom, yielding true financial freedom!
Includes all Foundation, any Transitional, plus:

PLANNING
Net Worth: Debt and Equity Optimization
Cash Flow: Advanced Monthly Budgeting
Cash Reserve: Ladders/Banking
Risk Management: P&C Review/Health Care/Elder Care
Employer Benefits
Retirement: Stock Options and Withdrawal Optimization
Major Purchase: Rental/Vacation 2nd Home
Education: 529 Plan Optimization
Tax: Optimization and Bracket Maximization
Estate: Guardianship/Special Needs/Legacy/Gifting

ASSET MANAGEMENT
Advanced Active Management
Income Distribution
Monthly Email Updates

SERVICE
Quarterly Review
Monthly Update and Accountability Call

BENEFITS
Tempus Organizer
Private Event Invites

Transitional — $700 to $2,500

Designed to develop the “trunk” from which your seasonal plan will blossom!
Includes all Foundation elements plus:

PLANNING
Net Worth: Debt Management
Cash Flow: Multi-Year Personal Risk Assessment
Cash Reserve: Optimization and Alignment
Risk Management: Survivorship, Income Replacement
Retirement Readiness
Tax Analysis: Effective Rate,
Required Minimum Distributions
Estate: Essentials Review

ASSET MANAGEMENT
Personal Risk Tolerance Assessment
Optimization and Alignment
Active Management Tempus/Non-Tempus Accounts

SERVICE
Six Month Progress Review
Tempus Tracker

BENEFITS
Social Event Invites
Tempus Account Online Access

Foundation — $600 to $1,200

This strategy is designed to establish your financial baseline, the “roots” from which your seasonal plan will evolve by providing the following:

PLANNING
Net Worth Analysis
Cash Flow Analysis: Inflows/Outflows/Discretionary
Cash Reserve Analysis
Tax Analysis: Marginal Rate
Estate: Essentials Inventory

ASSET MANAGEMENT
Portfolio X-Ray
Portfolio Risk Assessment

SERVICE
Annual Review

BENEFITS
Tempus Tidings
Annual Appreciation Event Invite
Personal Financial Website & Digital Vault

tempus ADVISORY GROUP

Fees will fall with the ranges above. Each situation is unique and actual fees are determined by individual case complexity. Tempus Advisory Group discusses all fees prior to providing services.