

COPILOT

An advice-only service model for clients looking for budget friendly financial planning solution. Clients will get access to [The Retirement Planning Club](#), group Q&A calls and 1:1 advice sessions. You will manage your own portfolio, build and maintain your own financial plan using NewRetirement, paired with our expert guidance.

- Retirement advice
- Investment advice
- Cash flow advice
- Risk analysis

Investment
\$147/m

PEGASUS

A done for you solution to elevate your wealth to the highest potential. This is a full-delegation service to optimize your wealth on all fronts. Clients get access to quarterly review meetings plus check-ins as needed. We will proactively maintain and optimize your financial plan and investment portfolio.

- Retirement planning
- Investment management
- Cash flow planning
- Risk management
- College planning
- Tax filing + planning
- Company benefits planning
- Estate planning
- Equity compensation planning
- Salary review
- Debt planning

Starting at \$6,000/y

Get started
resilientfp.com/applynow