



## COPILOT

A flat-fee, 12-month financial advice program for pre-retirees looking to ease into a relationship with a fiduciary advisor. You'll manage your own investments and we'll collaboratively optimize your financial plan using NewRetirement.

- Retirement advice
- Investment advice
- Cash flow advice
- Risk analysis
- Monthly webinars
- Access to 1:1 meetings
- Access an online Community



Book a call for pricing

## CFO

A full-delegation service to optimize your wealth on all fronts. Clients get access to regular 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 planning
- Company benefits planning
- Estate planning
- Equity compensation planning
- Debt planning



\$500k minimum account size

**Learn more**  
[resilientfp.com/call](https://resilientfp.com/call)