Financial Plan & Financial Plan +

Managing your money involves more than simply making and following a budget.

Our Approach is **Authentic Financial Planning**, no cookie cutters allowed. Each plan is inherently unique because it is a direct reflection of your situation and values. Your custom plan is delivered over a series of strategy meetings using robust interactive software, custom schedules and reports, execution options and action items. We explore unique situations every day and craft customized strategies that inspire confidence. As fiduciaries, we always strive to adhere to the standards set by the Securities and Exchange Commission (SEC).

For clients seeking asset management services in addition to financial planning we offer our Financial Plan+ service.

Our Financial Plan+ clients receive professional investment management services as well as full ongoing access to our team of advisors anytime they need our expertise.

We formally update your Financial Plan+ on an annual basis and will coordinate action items with other professionals such as CPAs, attorneys, and mortgage professionals.

Additional Services

Our experience is not just limited to qualified retirement plans. In many cases, a 401(k) is not a good fit or doesn't totally meet the needs of the employer. VestGen Downers Grove is active with other types of retirement plans which can benefit our clients.

These include:

- Simple IRA Plans
- Cash Balance Pension Plans
- Non-Qualified Deferred Compensation Plans

Pricing Schedule

FINANCIAL PLAN
No Investment Management Services

- Plans start at $4,000 and increase based on complexity.
- A deposit of 50% is required at the start of the process with the remaining balance due upon completion.

FINANCIAL PLAN +
With Ongoing Investment Management Services

- Asset-based rates start at 1.2% for the first $1MM of AUM.

Ready To Get Started?

Our process begins with completing a set of online Pre-Meeting Questions, which will give us an overview of your financial picture and objectives. Once received, we will reach out to schedule a complimentary introductory appointment. Our services always begin with a complimentary consultation.

Start Your Free Consultation

vestgen.com/downersgrove

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