



Presents

Financial Planning & Wealth Course for Young Professionals

Goal: obtain the tools needed to accumulate wealth and avoid common pitfalls along the way.

7-sessions to learn how to get from point A to point **Millionaire.**

1-on-1 Sessions With a Wealth Manager

60-90 Minutes Per Session

Cost: \$1,500 – **\$750 Upfront | \$750 at Completion**

SESSIONS

- 1. FEES** – The different ways that financial professionals get paid and different investments charge.
- 2. PLAN IT OUT** – We will work together to create a financial plan that will evolve as you do.
- 3. TAXES & SAVINGS** – There are different ways to save money and different rules for how the monies are taxed on the way in/out.
- 4. INVESTMENTS** – Education on the different types of investments and how to navigate the “ocean” of options available.
- 5. PORTFOLIO CONSTRUCTION** – We work with you to design a portfolio that will align with your risk and financial goals.
- 6. INSURANCE** – Take a look at the use of insurance and how your needs will change as you get older.
- 7. PARENTS** – Dealing with aging parents and how long-term care works.

www.WhiteHawkWealth.com

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