



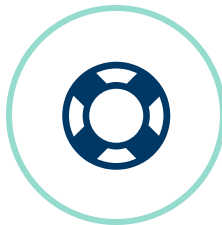
# OUR PROMISE TO YOU

We believe you should have access to high-quality financial planning **regardless of how much money you have**. Our goal is to empower you to live your best life and help you achieve your own unique definition of financial success.

**We want you to have an awesome experience with real people who genuinely want you to be successful.**

*We are a fiduciary and we put your best interests first.*

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Your Personal Wealth Advocate



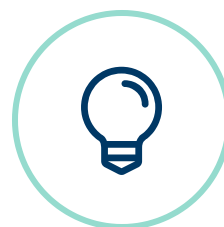
No commissions or Products



Fee-only Financial Planning



Investment Fiduciary



100% Locally Owned

Advice You Can Understand



Multigenerational Planning



No Cost To Meet

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As your financial planning partner, S.E.E.D. helps to coordinate all your financial planning, investment management, tax planning, and estate planning needs to provide you with the all-encompassing S.E.E.D. Planning Group experience.

***Our financial planning costs are fully disclosed, transparent, and easy to understand.***

## PLANNING CAN HELP YOU

- Determine your goals and objectives as you see your life develop
- Use your values and motivations as a framework for making choices and decisions

- Understand money is *only* a tool to help you get to where you want to be

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## PLANNING INCLUDES YOUR



### VALUES

- Family and Relationships
- Notions of Personal Fulfillment
- Beliefs and Attitudes
- Health and Well-being



### FINANCIALS

- Lifestyle Realization
- Debt Reduction
- Retirement and Investing
- Tax and Estate Planning



## COMMUNITY

- **Culture and Creativity**
- **Giving and Volunteerism**
- **Community Enrichment**
- **Stewardship and Legacy**

How do you define wealth? At SEED Planning Group, LLC we don't believe wealth is the amount of money you have.

Money is simply one tool you use to live your best life.

**Discover What Others Think**

**What Is Wealth?**



## WHAT'S ON YOUR MIND?

**Which option should I choose for my Social Security or Pension?**

**How can I ensure my family is financially provided for if I'm not here?**

**What are my options for funding my child's education?**

**What is the most tax-efficient way to gift money to family?**

**How much can I withdraw from my investments without running out of money?**

**Should I consider consolidating my investment accounts?**

## **A PLACE FOR YOU**

### **SPROUT IS FOR YOU IF YOU ARE:**

- Getting started
- Building your future
- Organizing and prioritizing your financial life

- Wanting objective advice with no sales

This is me

### **CORE IS FOR YOU IF YOU ARE:**

- Preparing for retirement
- In retirement
- Organizing and managing what you've accumulated
- Wanting to know if you're on track
- Wanting objective advice with no sales

This is me

### **WEALTH MANAGEMENT IS FOR YOU IF YOU ARE:**

- Seeking an all-inclusive program that coordinates income, investments, estate, & tax planning for over \$1 million in investable



assets

- Wanting objective advice with no sales

This is me

This is me

This is me

This is me

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### **SUITE(k)**

- Retirement Plan Design (401(k), 403(b), Cash Balance, Defined Benefit, etc.)
- Adherence to Fiduciary Plan Requirements
- Customized Employee Education and Financial Planning Services
- In-Depth Retirement Plan Provider Analysis and Selection
- Mergers & Acquisitions

This is me

## **SEEDS OF HOPE IS APPROPRIATE FOR THOSE NON-PROFITS**

- In need of development coaching
- Interested in investment stewardship guidance
- Looking for advice from fundraising professionals
- Creating a sustainable future through legacy gift planning
- Investment Stewardship Assessment and Guidance

This is me

This is me

This is me



## QUICK LINKS

[S.E.E.D. Values and Purpose](#)

[What It's Like to Work With a Fiduciary](#)

[Events](#)

## RECENT POSTS

[How Financial Planning Can Help You](#)

[Welcome to our new followers](#)

[Andrea Vaioli Earns Behavioral Financial Advisor™ Designation](#)

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