



[HOME](#)

[SERVICES](#)

[CLIENT PORTAL](#)

[BLOG](#)

[APPOINTMENT](#)

We offer comprehensive financial plans and portfolio management for pilots.
Created BY professional pilots that are Certified Financial Planners.

Submit
Info

Set Appointment

Implement Decisions



Submit Info

All financial planning starts with three basic pieces of information: goals, timelines, and resources. Take 10 minutes to complete basic information about you. Don't know everything from memory? That's ok, as estimates are fine for this stage. We will get exact numbers as we proceed.

START NOW

Discover a goal-focused, planning-driven approach

You've worked too hard at a stressful job, in a harsh environment, to not live well in retirement. You should be free to enjoy each day, fully engaged with your friends - or the grandkids. You deserve to maintain your dignity and independence throughout the entirety of your retirement. CAVU can help you approach retirement with confidence.

START NOW

What makes CAVU so different?

Retirement is primarily an income problem. Will your income last through three decades of retirement - in a rising cost environment? CAVU Retirement Planning helps you gain clarity. We guide you in making decisions that maintain your dignity and independence for the rest of your lives.

Continue reading

LEARN MORE

Why should I start now?

Will you outlive your money? Will your freedom be limited? Will you be able to spend time with your spouse or your grandchildren? Will you have a constant worry and anxiety about money?

As a professional pilot, you cannot delay your retirement past age 65.

START NOW

Our Services

We are primarily financial planners. We help you develop goals, determine timelines, and identify resources. Once this plan - your plan - is developed, it becomes the basis for the creation and management of your portfolio. The portfolio purely exists to fund your plan. It is only a tool, and is never an end unto itself.

After your financial plan and your portfolio are in place, then the real work begins. Getting on a plan is relatively easy... staying on one for years and decades is hard, too difficult for most people.

You choose how we help and guide you. Our primary focus is a comprehensive approach, which we call our FMS service. We charge a fee to develop your financial plan, and to manage your portfolio we charge a percentage of the assets we manage.

For those wanting more of a hands-on approach, we offer a modular planning system to address specific needs. This option, our DR service, provides coaching, insights, and planning tools in the areas of Cash Flow Management, Employee Benefits, Investment Strategy, and Estate Planning

[START NOW](#)

An Investment in Your Future

Partnering with CAVU is an investment in your future, helping you gain clarity, confidence, and peace of mind that you CAN live well in retirement, with dignity and independence.

FMS Service

This comprehensive approach has a financial planning fee that varies on the complexity of your situation, with most plans coming in at \$5,000. Our investment management fee, discounted substantially for professional pilots, is an annual 1.00% of the assets we manage (our normal fee is 1.5%).

DR Service

Each module in our DR Service package (Cash Flow Management, Investment Strategy, Employee Benefits, and Estate Planning), is discounted for professional pilots by 40%, making them \$120 annually. You can mix and match them to fit your specific situation.

Will you outlive your money? Gain clarity on your retirement in 3 easy steps!

START NOW

Start Now in 3 simple steps

Complete our consultation form - less than 10 minutes

Schedule your complementary on-line consultation
(30-60 minutes)

Relax, confident that the financial plan you construct
with a CAVU retirement specialist is the best track for
you to live well in retirement



Get in Touch

Enter your name

Enter your email address

Enter your Phone

Send Request



[Home](#)

[About](#)

[Services](#)

[Blog](#)

[Certified Financial
Planner](#)

[Client Portal](#)

[Disclosures](#)

[TOP](#)