Subject Matter Experts are third party firms that we have partnered with who have extensive product knowledge and expertise in their field. They show expertise in areas such as life insurance, trusts, estate planning, tax planning, etc.

As part of your My Financial Coach Planning Experience, these Subject Matter Experts will not charge you higher fees to consult with them through our service. Additionally, if you choose to work with them, our financial coaches will never be measured or paid for the referral. This allows us to offer our mile wide and mile deep level service that gives you the best of the world of financial product knowledge with unbiased and unconflicted financial planning and modeling. Together, we are looking to help you gain the security of knowing that you are efficiently on track to reach your goals with the comfort of knowing you are not being sold products or services that don't help get you there effectively!

What is the Process?

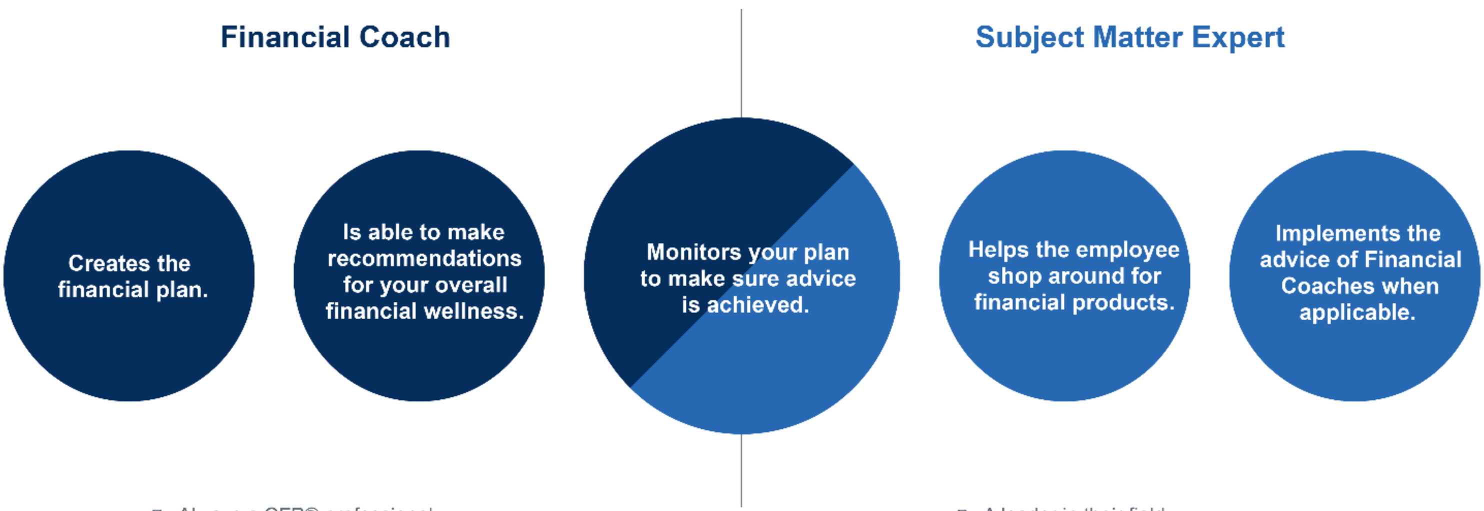
1. A financial coach meets with the client.
2. The coach and client have an in-depth conversation around client goals, cash flow, retirement, and foundational coverages.
3. The Financial Plan is delivered to the client with analysis and recommendations.
4. If a client needs additional support because they lack resources in a specific area such as tax planning or investments, a SME is positioned to the client and permission is asked to share their financial plan with this individual.
5. An introduction is made between the SME and client regarding the recommendation.

FAQ's

Are your coaches compensated via commissions for this referral?
No, all of our coaches are paid on salary and a bonus based on clients experience.

Are the SMEs a part of My Financial Coach?
The SMEs are individual businesses that have their own operations.

Why work with a Financial Coach if they can't sell products or provide investment advice?
Since our coaches are paid on salary and a client service based bonus, and our firm does not sell products or hold assets under management, we are able to stay truly unbiased and unconflicted when we give advice. By partnering with SMEs, we can offer our clients access to specialists in their respective fields so our clients get the best of both worlds.



- Always a CFP® professional.
- Is never directly compensated by any product solution recommendations in the form of fees or commissions.
- Access via email 24/7 with the ability to schedule meetings as necessary.

- A leader in their field.
- Thoroughly reviewed and vetted by My Financial Coach.
- Compensated through commissions and fees or in line with industry.

MY FINANCIAL COACH