

IN-DEPTH PLANNING FOR A ONE-TIME FEE

Schwab Personal Financial Plan

- We can work with you to develop a comprehensive financial plan that addresses multiple investing and planning goals.
- We'll review your current financial situation, including insurance, retirement goals, cash flow, and more, then develop a comprehensive plan based on your needs.
- The Schwab Personal Financial Plan is available to AARP members at a 20% discount for a one-time fee of \$1,600.

Schwab Retirement Consultation

- Whether you're saving for retirement or are already there, a Schwab Certified Financial Planner™ can help you develop or carry out a smart plan for your future.
- Years away? Get a thorough, step-by-step action plan for accumulating the money you'll need. Retiring soon? We'll help you create a realistic income plan. Already retired? Get specific advice for making the most of your retirement savings.
- A Schwab Retirement Consultation is available to AARP members at a 20% discount for a one-time fee of \$880.

Schwab Equity Compensation Consultation

- Get in-depth analysis and recommendations to help you maximize the value of your company stock and stock options.
- We'll assess your company stock and stock options, discuss your long- and short-term cash needs, review your entire portfolio, and provide a customized stock option strategy and an action plan.
- A Schwab Equity Compensation Consultation is available to AARP members at a 20% discount for a one-time fee of \$1,600.



**Call Schwab at
877-310-7746
to schedule your
consultation.**

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