Do It For Me

FINANCIAL PLANNING DONE FOR YOU

Get Freedom!

Focus on the important things in life with our Do it for Me financial planning. We will do the hard work of handling your financial planning needs so you can spend your time and energy on what's most important in life.

Stop wasting your time. Get your time back today!

Get Organized

Aggregate all your financial data into one place for easy access and review.

Annual Reviews

We'll provide you with an easy to follow one-page financial plan and two annual reviews each year.

Investment Management

You'll get a fully executed plan by a financial professional so you can focus on what's most important.

What's Included

- ✓ WealthVision Access
- ✓ Secure Online Document Storage
- ✓ Monthly Financial Planning Topic Guidance
- ✓ Mobile App
- ✓ Coordination with Existing Professional Network
- ✓ Attend Seminars and Client Events Live or Virtually
- ✓ Investment Management
- ✓ Automatic Budget Tracker
- ✓ On Demand Planner
- ✓ Single Sign In to See All of Your Accounts Updated Daily
- ✓ Advice on Assets Held Outside of Thrive
- ✓ Live Updated 1 Page Financial Plan Summary
- ✓ Comprehensive Annual Financial Review
- ✓ Annual Investment Focused Review

1% AUM Fee

Reduced at $1M+. Setup and subscription fees waived for clients with $250K+ in assets.

View all of our plans at ThriveWealthStrategies.com/how-i-serve

THRIVE
WEALTH STRATEGIES

Get Freedom for Your Finances.

Book a call to get started at ThriveWealthStrategies.com

Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC.