

Do It Myself

FINANCIAL PLANNING DONE BY YOU

Get Organized!

Gain control of your finances. With a single log-in, you can organize your accounts, see where you currently stand, and develop a plan that will help you pursue your financial goals. Expenses are automatically categorized and data is updated daily to give you an instant snapshot of your financial standing. Run reports to get the data you want, when you want it.

Stop wondering about your finances.
Get organized today!



One Login

Access all of your financial accounts through a single login.

Training Videos

Get the training you need to make sense of your finances.

Document Storage

Secure online storage for all of your important financial documents.

What's Included

- ✓ WealthVision Access
- ✓ Secure Online Document Storage
- ✓ Monthly Financial Planning Topic Guidance
- ✓ Mobile App
- ✓ Coordination with Existing Professional Network
- ✓ Automatic Cash Flow Tracker
- ✓ Attend Seminars and Client Events Live or Virtually

\$50/month

**\$0 set-up.
Cancel anytime.**

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



Organize Your Finances Today.

Book a call to get started at ThriveWealthStrategies.com

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