



**SCARBROUGH
FINANCIAL GROUP, LLC**
A Registered Investment Advisor

Summary of Planning Services

Retirement Income Projection	\$1250
<ul style="list-style-type: none">• Asset Distribution by Asset Class and Tax Category• Tax and Inflation Analysis• Integration of Employee Benefits• Social Security Election• Accumulation Strategies• Distribution Options• Monte Carlo Simulation• Hypothetical Scenario Analysis	
Summary & Recommendations	Included
Investment Analysis (up to five accounts)	\$ 500
<ul style="list-style-type: none">• Current Portfolio Allocation by Asset Class• Sector Weighting• Overlap Analysis• Back-tested Performance• Risk-assessment• Proposed Reallocation	
Investment Risk Assessment	Included
Insurance Review	\$ 250
<ul style="list-style-type: none">• Life, Long Term Care, Disability, Umbrella (Liability)	
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Basic Plan	\$ 2000
Additional Modules:	
Estate Summary Plan	\$ 500
<ul style="list-style-type: none">• Asset Ownership• Titling and Beneficiary Designations• Planning Strategies: Gifting & Wealth Transfer	
Education Plan	\$ 250
<ul style="list-style-type: none">• Projected Cost Estimate• Source of Funds• Liquidation Schedule	