Offered by CSLA Financial Inc

Fee Only Financial Planning

CSLA Financial's comprehensive planning approach includes a suite of tailored solutions for optimizing your income while managing the key risks that could challenge your financial security

Overview of Financial Planning Services

The Process by which individuals, business and families develop and implement a comprehensive plan for achieving their financial goals

Building your financial future

CSLA Financial is a fiduciary fee only Investment Advisory Firm that offers 3 distinct financila planning services.

Student Loan Repayment Assistance

$25/mo

- Annual Meeting
- 1.5 hr of advisory time /yr
- For review of and re-certification of client on IDR plans

Interactive Financial Plan

$75/mo

- Semi -annual Meeting
- 4.5 hr of advisory time /yr
- For review updates and implementation of financial plans

Individual Goal Plan

$200 /hr

One time financial planning and consultation service provided to individuals, families and other clients. Analysis of a clients current situation, goals and objective. Preparation of a financial plan or rendering of a financial consultation for client based on the financial goals and objectives selected.

- Cash Flow/Debt Management
- Employee Benefits
- Estate Planning
- Comprehensive Financial Planning
- College Planning
- Business/Entity Planning
- Risk Management
- Retirement Planning
- Student Loan Repayment
- Investment Consulting
- Tax Planning
- Other client defined financial concerns

Financial Planning Process

1

Discovery

2

Analysis

3

Solutions

4

Implementation

KNOWING WHERE YOU ARE NOW, WHERE YOU WOULD LIKE TO BE, AND WHAT RESOURCES YOU HAVE TO MAKE THAT HAPPEN CAN HELP YOU FACE THE FUTURE WITH CONFIDENCE

Doing the Right Thing Matters

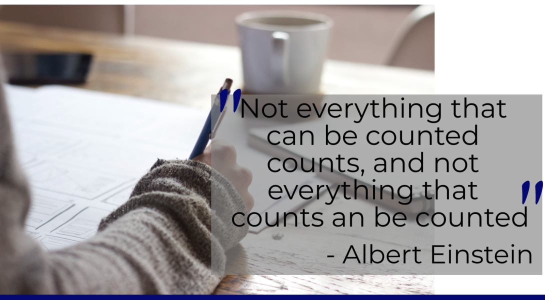
When it comes to choosing a financial advisor, you'll want to use and know one word: **FIDUCIARY**

A fiduciary has a legal duty to act in your best interest. Those not working to the fiduciary standard are held only to a suitability standard, meaning their advise must only be suitable for your financial situation. It's a key financial term that indicates the level of responsibility an advisor has to your needs.

Yet most Americans cannot define fiduciary. CSLA Financial's comprehensive approach includes a suite of tailored solutions for optimizing your income while managing the key risks that could challenge your future security, and puts them at risk.

If you're paying for financial advice, you want someone who will put your interest fist, not their own. So it's important to be specific when asked about whether or not a prospective advisor is a fiduciary.

For a full description of fess and services offered please view CSLA Financial ADV part 2 brochure



"Not everything that can be counted counts, and not everything that counts an be counted"

- Albert Einstein

www.cslafinancial.com