MONEY DOESN'T HAVE TO BE SCARY OR SERIOUS ALL THE TIME. MONEY CAN BE ABOUT JOY, SECURITY AND CONFIDENCE. LET ME HELP YOU CHANGE THE WAY YOU SEE YOUR FINANCES. FOREVER.

Sophia Bera
Financial Planner

Gen Y Planning: Quick Start Session

Sometimes you just need to talk to a CFP® about your most pressing financial question.

- Have you taken on a new job and need help choosing your company benefits?
- Did you recently finish grad school and want a plan for your student loans?
- Do you want to save more money for retirement and aren't sure if you should contribute to a 401(k) or Roth IRA?
- Did you just have a baby and you wondering which 529 Plan to use for college savings and how much to set aside each month?
- Do you need someone to review your life insurance documents and identify the amount of life insurance you need and what types of insurance you should buy?

Over the past few years, I've talked to hundreds of Millenials who are seeking specific financial advice, but who aren't ready to invest in a comprehensive financial plan. I know you want your financial questions answered and I'm here to help.

That's why I created the Quick Start Session!

What's Included?

- A 60-90 minute Skype call to take a deep dive answering one or two financial questions.
- A follow up email with recommendations in those specific areas we addressed on our call.

What's Not Included?

- This is not a comprehensive financial plan. These sessions are designed to quickly provide you an answer to one or two of your most pressing financial questions.
- It does not include ongoing service. It's a one-time session with one follow up email.

Go to GenYPlanning.com to set up a free 30-minute strategy session and find out about current pricing for the Quick Start Session.

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