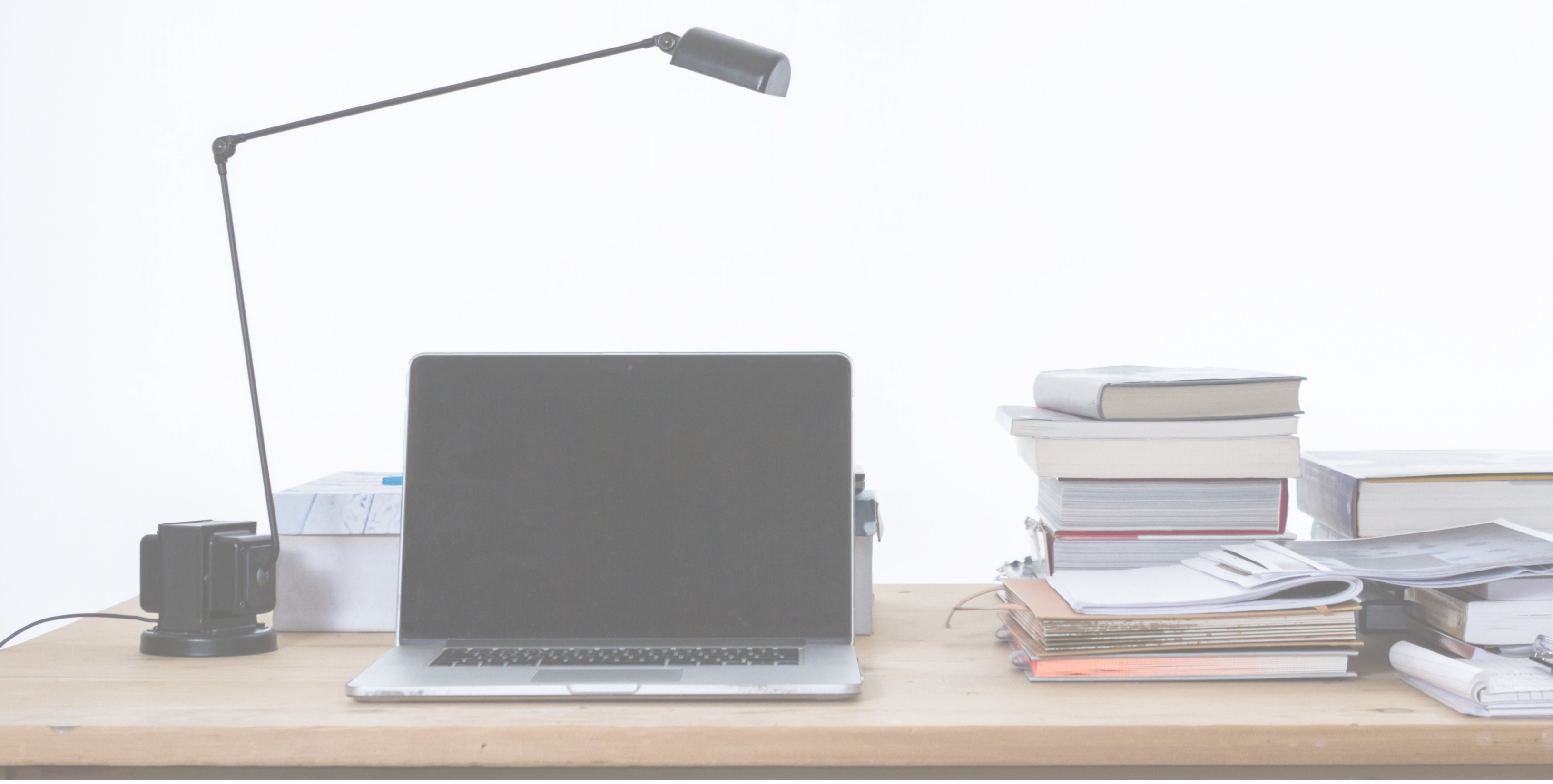
OUTSOURCED PLANNING

A Teammate to Busy Financial Planners



Get the help you need, when you need it, delivered by a CERTIFIED FINANCIAL PLANNER™

A Note from Our Founder

Hi, I'm Dave Bowman, Founder and Lead Virtual Planner at Outsourced Planning.

Outsourced Planning started with a simple idea: what if great planners could free up their time, while getting more done, for a fraction of what they charge clients? What if you could turn that support on only when you need it, then hit the pause button when you don't? Would that accelerate your business? Could it improve your life?

In 2015, a couple of trends in the financial planning profession really struck me and lead me to form Outsourced Planning. The most apparent: while many of the planners I knew were passionate about financial planning and serving their clients, most were professionally drained. They loved growing their businesses and meeting with clients, but struggled to keep up with their commitments. They worked harder, felt more stress in their free time, and didn't know how to escape the self-feeding cycle.

At the same time, I started to see how managing human capital was a constant and related strain. By the time these firm owners decided they needed to hire, they were often already buried. They were faced with designing a position, recruiting, on-boarding, and managing a new associate, and then trying to keep them engaged, competitively paid and growing so they wouldn't leave.

I think the profession is starting to see a better, healthier way to grow. You can get the incremental help you need, grow responsibly and service your clients better. If you could use a teammate, let's chat. I'd love to help you focus on what inspires you.

-Dave

David C. Bowman, CFP®, CCFC
Founder

What We Do

You're a busy advisor. Let's us free you up.

The help you need, when you need it.
Our services are 100% on-demand.

Financial Planning Services
Financial Planning Analysis
Case Modeling in Financial Planning Software
Written Plan and Deliverable Creation
Meeting Agenda Preparation
Retirement Planning Scenario Modeling
Ongoing Updates and Review-Meeting Prep.
Second Set of Eyes

Operational Services
Standard Operating Procedures (SOPs)
Technology Consulting
Training New Planning Associates and Paraplanners
Project Management

Business Planning/Strategy Services
Growth Consulting and Professional Coaching
Best Practices & Strategic Planning

Need help with something not already on this list? Let us know.
Additional services are available upon request.

How It Works

Our meeting-prep reviews are customizable to your needs, but most look something like this.

Collect Client Data

Collect the client data you'd like us to review. We can help fine-tune your data-gathering process, or work directly with your clients to gather information.

Share Client Data

Share statements, policies, meeting notes and other client data via secure, cloud-based storage.

Outsourced Review

We review the data, model it in your planning software, and provide notes, summaries, recommendations, and any other deliverables you need.

Collaborate

Together we discuss the case as much or as little as you need making sure you're comfortable with assumptions and recommendations.

Finalize

Based on your needs, Outsourced Planning completes any additional review, research, scenario modeling or other deliverables.

Client Meeting

You're ready to have a deeply-impactful meeting with your client!

Your Turnkey Solution

You can focus on the work you actually enjoy.
Let our CFP® professionals handle the rest.

Grow your expertise and experience.
We take pride in providing CFP®-level expertise for every plan. We're already familiar with your software and provide a professional level of analysis and recommendations.

Grow your practice.
Having worked with a diverse group of planners across the country, we can share best practices along the way, freeing you up to grow and optimize your business.

We're virtual and scalable.
Capacity is no longer an issue. Our team grows with you and your business needs.

Pricing is flexible and straight-forward.
Monthly retainers tend to work best for our clients, but we also offer simple hourly pricing for limited or sporadic engagements (see below).

No more frustrating hours training a new hire.
Our team can make the most of your software, today.

eMoney | Envestnet MoneyGuide | RightCapital | College Aid Pro™

Redtail | Wealthbox | Bloomberg BNA | Dropbox

Precise FP | freshdesk | Family Law Software | box

slack | ROL Advisor | Life Planning for You — Bringing Life to Money | ComConnect File Sync

LastPass | DocuSign | AWeber | mailchimp

Trello | asana | monday | Notion

Google Workspace | Microsoft 365 | Evernote

loom | AdvicePay | Canva

Don't see your software here? Let us know!
We're always looking to expand this list to better serve you.

Schedule of Fees

Per Hour

$125 / hour

No minimums or commitment

Hours tracked via Toggl application

Retainer

Hours/Month	Hourly Cost
10-24 hours	$120 / hour
25-39 hours	$115 / hour
40+ hours	$110 / hour

Unused hours do not carry over

Extra Hours

Retainers are flexible (e.g. 15 hours/mo. = 15 x $120 or $1,800/mo.)

Extra hours are billed at $125/hour

Invoices typically sent on the 1st and 15th of the month

What's Next

Our consultative process helps to make outsourcing work - the first time.

Step 1 - You talk and we listen.
During an introductory call, our aim is to deeply understand your unique goals, challenges and style. We use this time to ask questions that tend to help clarify those things. If you have questions for us, we're happy to answer those as well.

Step 2 - We propose a plan for success.
After we've learned about what you want to accomplish, we go back to the workshop and develop a first draft for how to get you there. Then we work together, making sure to get this plan right before moving on.

Step 3 - You choose a cost structure that works for you.
Without overwhelming you with choices, our pricing is meant to give you flexibility and customization to match the needs of your business.

Step 4 - Together, we get organized.
We'll set one meeting to handle any administrative setup such as sharing clients in eMoney, as well as sign a contract and non-disclosure agreement protecting you and your clients.

Step 5 - Our team gets to work.
We make it easy to get started right away by adopting your existing systems, software and processes. Based on the plan we built together, we get right to work.

Step 6 - We communicate based on your needs.
We establish a plan early on to make sure you're in the know without being overwhelmed.

Your Next Steps

We make it easy to get started.
Let's see if it's a good fit.

Click Here To Schedule Your Introductory Call Today

David C. Bowman, CFP®, CCFC
Founder