

**Getting started with Sommers Financial Management**

**I just want financial advice / planning / coaching**

**I like to meet face-to-face**

**PREMIUM FINANCIAL PLANNING**

**I am comfortable with online and telephone consulting**

**INTERACTIVE FINANCIAL PLANNING**

**I have more than \$250k to invest**

**I want a custom portfolio and investments**

**WEALTH MANAGEMENT (PREMIUM FINANCIAL PLANNING)**

**I want a low-cost tax-efficient model portfolio**

**I want financial planning / help coaching**

**I like meeting in person and want estate help**

**INVESTMENT MANAGEMENT & PREMIUM FINANCIAL PLANNING**

**I like to interact online and on the phone**

**INVESTMENT MANAGEMENT & INTERACTIVE FINANCIAL PLANNING**

**I just want investment help**

**INVESTMENT MANAGEMENT**

**I have less than \$250k to invest**

**I want financial planning / help coaching**

**I like to meet in person**

**I want to invest too**

**INVESTMENT MANAGEMENT & PREMIUM FINANCIAL PLANNING**

**I don't want to invest, just planning / coaching**

**PREMIUM FINANCIAL PLANNING**

**I like to interact via phone, email and online**

**I want to invest too**

**INVESTMENT MANAGEMENT & INTERACTIVE FINANCIAL PLANNING**

**I just want planning / coaching**

**INTERACTIVE FINANCIAL PLANNING**

**I don't want financial advice, just investment management**

**INVESTMENT MANAGEMENT**

 **SOMMERS FINANCIAL MANAGEMENT**  
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