Gratia Life, LLC

A Life & Financial Fiduciary

Plans & Pricing

Gratia Life Promo FREE Trial (1 month)	Gratia Life Coaching $25 per month subscription	Gratia Life Coaching Plus $50 per month subscription
Financial Planning (Cloud) Software	Financial Planning (Cloud) Software	Financial Planning (Cloud) Software
Full Access – **Software Evaluation, ONLY!**	Full Access - Monthly **Coaching** Contract	Full Access - Monthly **Coaching** Contract
Live Introduction w/ Q&A (30 mins+)	Life/Financial Coaching (15 mins+/mo)	Life/Financial Coaching (30 mins+/mo)
Business Line Access	Direct Line Access	Direct Line Access
Remote Phone, email, and chat support	Remote Phone, email, & chat support	Remote Phone, email, and chat support
No Financial Coaching	**Financial Coaching**	**Financial Coaching**
No Investment Advice	No Investment Advice	No Investment Advice
No Asset / Portfolio Management	No Asset / Portfolio Management	No Asset / Portfolio Management
Investable Asset Minimum (N/A)	Investable Asset Minimum (N/A)	Investable Asset Minimum (N/A)
Evaluation Review	Annual Review	Annual Review
Software Modules	**Software Modules**	**Software Modules**
PDF Financial Reports	PDF Financial Reports	PDF Financial Reports
Basic Financial Data Input/Analysis	Basic Financial Data Input/Analysis	Basic Financial Data Input/Analysis
Bank/Broker/Insurance Aggregation	Bank/Broker/Insurance Aggregation	Bank/Broker/Insurance Aggregation
Transaction Tracking	Transaction Tracking	Transaction Tracking
Smart transaction categorization	Smart transaction categorization	Smart transaction categorization
Income/Expenses/Loans/Debt	Income/Expenses/Loans/Debt	Income/Expenses/Loans/Debt
Budgeting Tools	Budgeting Tools	Budgeting Tools
Assets/Liabilities/Net Worth	Assets/Liabilities/Net Worth	Assets/Liabilities/Net Worth
Secure Document Vault	Secure Document Vault	Secure Document Vault
Insurance planning	Insurance Planning	Insurance Planning
Investment planning		
Retirement planning		
College planning		
Tax planning		
Estate planning		
Personalized plan		
Sign Up		
http://GratiaLife.com/RC		

Please, contact me to answer any questions about which plan would be BETTER, for you. - Randall S Swetnam

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Core Planning, LLC

A Registered Investment Advisor

Plans & Pricing

(IMPORTANT: core planning, llc is a distinct entity/company that provides Registered Investment Advisory Services and is wholly separate from, and has NO AFFILIATION with, Gratia Life, LLC and/or its designated DBAs.)

Core Planning Advisory $150 per month subscription	Core Planning Advisory Plus $150 per month subscription OR 1% AUM Annual Fee (whichever is greater)
Financial Planning (Cloud) Software Full Access - Annual **Advisory** Contract Life/Financial Coaching (1 hr+/mo) Direct Line Access Remote Phone, email, and chat support **Financial Planning Advice** **Investment Advice** DIY Asset / Portfolio Management Investable Asset Minimum (N/A) Annual Review	Financial Planning (Cloud) Software Full Access - Annual **Advisory** Contract Life/Financial Coaching (1 hr+/mo) Direct Line Access Remote Phone, email, and chat support **Financial Planning Advice** **Investment Advice** **Asset / Portfolio Management** Investable Asset Minimum ($100K) Annual Review
Software Modules PDF Financial Reports Advanced Financial Data Input/Analysis Bank/Broker/Insurance Account Aggregation Transaction Tracking Smart transaction categorization Income/Expenses/Loans/Debt Budgeting Tools Assets/Liabilities/Net Worth Secure Document Vault Insurance planning Investment planning Retirement planning College planning Tax planning Estate planning Personalized plan	**Software Modules** PDF Financial Reports Advanced Financial Data Input/Analysis Bank/Broker/Insurance Account Aggregation Transaction Tracking Smart transaction categorization Income/Expenses/Loans/Debt Budgeting Tools Assets/Liabilities/Net Worth Secure Document Vault Insurance planning Investment planning Retirement planning College planning Tax planning Estate planning Personalized plan

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