

Gratia Life, LLC A Life & Financial Fiduciary

Plans & Pricing

Gratia Life <u>Promo</u> FREE Trial (1 month)

Financial Planning (Cloud) Software
Full Access – Software Evaluation, ONLY!
Live Introduction w/ Q&A (30 mins+)
Business Line Access
Remote Phone, email, and chat support
No Financial Coaching
No Investment Advice
No Asset / Portfolio Management
Investable Asset Minimum (N/A)
Evaluation Review

Software Modules

PDF Financial Reports Basic Financial Data Input/Analysis Bank/Broker/Insurance 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

Sign Up

http://GratiaLife.com/RC

Gratia Life Coaching \$25 per month subscription

Full Access - Monthly Coaching Contract Life/Financial Coaching (15 mins+/mo) Direct Line Access Remote Phone, email, & chat support Financial Coaching No Investment Advice No Asset / Portfolio Management Investable Asset Minimum (N/A)

Financial Planning (Cloud) Software

Software Modules

Annual Review

PDF Financial Reports
Basic Financial Data Input/Analysis
Bank/Broker/Insurance Aggregation
Transaction Tracking
Smart transaction categorization
Income/Expenses/Loans/Debt
Budgeting Tools
Assets/Liabilities/Net Worth
Secure Document Vault
Insurance Planning

Gratia Life Coaching Plus \$50 per month subscription

Financial Planning (Cloud) Software
Full Access - Monthly Coaching Contract
Life/Financial Coaching (30 mins+/mo)
Direct Line Access
Remote Phone, email, and chat support
Financial Coaching
No Investment Advice
No Asset / Portfolio Management
Investable Asset Minimum (N/A)
Annual Review

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Insurance Planning



Core Planning, LLC

A Registered Investment Advisor

Plans & Pricing

(IMPORTANT: core planning, Ilc 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

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

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

Core Planning <u>Advisory Plus</u> \$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

Asset / Portfolio Management

Investable Asset Minimum (\$100K)

Annual Review

Software Modules

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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