

Financial Planning Pricing



At Vesta, we believe in transparency and openness regarding our fees. Below is a comprehensive list of frequently utilized services along with their corresponding prices. In our initial consultation, your advisor will discuss the most appropriate level of planning based on your unique situation.

Financial Planning Services	Financial Consulting (12 month commitment with renewable options)	Financial Planning *	Update Cost
Foundation Planning	\$200/month	\$2400+	\$750
Comprehensive Planning	\$300/month	\$3600+	\$1000
Complex Planning	\$400/month	\$4800+	\$1250
Hourly/Project Fee \$300/Hour			

*Pricing may increase due to complexity of your personal financial plan.

What distinguishes Financial Consulting from Financial Planning?

Financial consulting & planning aim to ultimately achieve the same goal: to help you receive clarity around your finances and a clear path forward on how to reach your financial goals.

- Financial Consulting is meant for those who have an ever-evolving situation or prefer to tackle projects in smaller bite-size pieces over the course of a year.
- Financial Planning is a more formal approach that entails four to five sessions to establish financial objectives, determine actionable steps, and lay out a comprehensive plan to accomplish them.

Below are additional distinctions between the two programs:

Financial Consulting	Financial Planning
Monthly Touchpoints Bi-Monthly Meetings (For Complex Level more meetings may be necessary)	Typically 3 month process with average of 4 meetings
Deliverables throughout the year	Action items and deliverables provided in final meeting
Renewable at year end	Implementation Review meeting (6 months after plan delivery)