

## DIY Consult Menu

For people who want to do it themselves—but not *by* themselves.

### **Budget & Cash Flow Check-Up – \$275 (90 min)**

Build or refine a values-aligned budget and cash flow system that actually works for your life.

### **Debt & Savings Game Plan – \$225 (75 min)**

Map out a realistic and flexible plan to pay off debt, build savings, and work toward a big goal.

### **Investing & Retirement Starter Session – \$450 (120 min)**

Learn how to confidently manage your investments and understand your retirement options, even if you're just starting out.

### **Tax & Income Strategy Session – \$200 (60 min)**

Clarify tax planning opportunities, deductions, and income structure—especially helpful for self-employed or multi-income clients.

### **Insurance Review – \$95 (45 min)**

Review your existing coverage—life, disability, health, or long-term care—to see what's working, what's missing, and what's worth adjusting. No sales pitch, just straightforward guidance so you can feel confident and protected.

### **Life & Legacy Planning Basics – \$200 (60 min)**

Understand the key elements of estate planning, organize your accounts, and clarify what matters most as you plan for the future.

### **Business or Side Hustle Strategy Session – \$275 (90 min)**

Get guidance on business setup, income planning, taxes, and how to integrate business and personal finances.

### **DIY Plan Review – \$275 (90 min)**

Bring your spreadsheet, plan, or money map. We'll review it together, fill in gaps, and make sure it all makes sense.

*Please refer to our Form ADV Part 2 brochures for a more detailed explanation of the advisory services offered. These brochures disclose information about the qualifications and business practices of Mutual of Omaha Investor Services, Inc. as well as the services provided, addresses, disciplinary actions, outside business activities, and potential conflicts of interest. Should you have any questions on these documents, please reach out to your financial advisor. In addition to the advisor fee outlined, additional fees for this service will be incurred and may include third party asset management fees (which are generally a percentage of assets invested in the program) and the underlying investment expenses (including but not limited to mutual fund sales loads, ticket charges, transaction fees, etc.) The total fee charged to you will vary depending on the program chosen. These fees are outlined in the third party money manager's disclosure documents.*