thrive FINANCIAL

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.