***Subject Line: 75% of Americans Manage Finances on Their Own***

75% of Americans manage

finances on their own1

Give them extra guidance through a streamlined process

with Foundational Planning.

**Let's say your client has a retirement goal in mind:**

* Set the age they want to retire
* Enter their income sources—salary and bonus, expected Social Security benefits
* Add their expected annual expenses plus current retirement savings and contributions
* Create conversations by demonstrating probability of success and adjustments they can make to hit their goal (simple as that!)

Interested in Foundational Planning?

**Click Here to Request a Demo**

*1) CNBC and Acorns Invest in You Savings Survey, Apr 2019.*