JudyCarlson, CPA

PROTECT FAMILIES FINANCIALLY

1. Financial Planning Fee:

We charge an initial planning fee for the design of a comprehensive lifetime wealth plan. The fee is determined after we have reviewed the complexity of your situation and includes the plan design and twelve months of service. Most of our clients annually renew their agreements with us to take advantage of our supervision of their financial affairs on an on-going proactive basis.

2. Product Implementation:

During the planning phase we may discover investment or insurance products that would be appropriate to fill a void in your current situation. If we identify a suitable solution, we expect to serve as your personal representative in the financial marketplace. In this event, we are paid fees for investments and commissions for insurance for the implementation of a product solution.

3. Personal Introductions:

The final way we are paid is the most important part of our compensation. Our success is measured by our clients' satisfaction and their resulting commitment to refer us to people that may need our services. If you are pleased with the service you receive from Carlson Financial Group, we ask for your help in introducing us to others who could benefit from the type of work we do.

Judy Carlson, CPA
Lifetime Wealth Strategist
Investment Advisor Representative
M: 720-445-1308
judy@judycarlson.com
judycarlson.com