

TEN YEARS to a MILLIONAIRE

As a successful professional, you will most effectively build your net worth with specific advice regarding investments, retirement and income tax planning. Such high quality, customizable wealth management solutions have typically been reserved for clients with a net worth of \$1 million.

Our D3 Accelerator Program™ is now offered to qualifying individuals who are motivated and on track to achieve \$1 million of investable assets in ten years or less.

D3 Accelerator Program™ customized services include:

- ◆ Initial development of D3's Goal Planning Service (GPS)
- ◆ Assistance with account consolidation (if necessary)
- ◆ Ongoing investment management (including 401k funds)
- ◆ Semi-annual performance reporting
- ◆ Annual income tax preparation
- ◆ One "flex" hour per quarter to be used for hourly financial planning.
Recommended topics include:
 - ◆ Budget establishment/review
 - ◆ Education planning
 - ◆ Estate planning
 - ◆ Insurance review
 - ◆ Employee benefits review
 - ◆ Tax planning
 - ◆ Debt management
- ◆ Additional planning hours available at \$250 per hour

D3 Accelerator Program™ Participation:

D3 Financial Counselors will accept clients into the program who are expected to meet the following criteria:

Current Investable Assets	Annual Savings
\$ 0	\$ 73,000
\$ 50,000	\$ 65,000
\$ 100,000	\$ 58,000
\$ 150,000	\$ 51,000
\$ 200,000	\$ 44,000
\$ 250,000	\$ 37,000
\$ 300,000	\$ 30,000
\$ 350,000	\$ 23,000
\$ 400,000	\$ 16,000
\$ 450,000	\$ 9,000
\$ 500,000	\$ 2,000
\$ 550,000 and above	Not depleting assets for 10+ years

Cost: The *greater* of 1% of assets under management, or the following minimum fees per year:

Year in Program	Minimum Fees
1	\$ 2,500
2	\$ 3,250
3	\$ 4,000
4	\$ 4,750
5	\$ 5,500
6	\$ 6,250
7	\$ 7,000
8	\$ 7,750
9	\$ 8,500
10	\$ 9,250
11	\$ 10,000

D3 Financial Counselors
Ethics, Education, Experience™
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