

## Wanting to Work with a CFP® Professional for Your One-Time Financial Plan?

If you're considering a one-time financial plan, partnering with a Certified Financial Planner® (CFP®) professional can help you maximize the value of the process. CFP® professionals are trained, certified, and held to a fiduciary standard, which means they are committed to putting your best interests first. Here's why working with a CFP® professional can make a difference:

### 1. Expert Guidance for Your Unique Financial Situation

- A CFP® professional will take the time to understand your goals, whether it's saving for retirement, buying a home, or planning for your child's education.
- Their expertise allows them to craft a personalized plan tailored to your needs, even if your financial situation is complex.

### 2. Cost-Effective, Flat-Fee Service

- With a one-time plan, you'll pay a transparent flat fee for the service, ensuring no surprises or ongoing charges tied to portfolio performance.
- A CFP® professional focuses on delivering high-quality advice, not generating commissions.

### 3. Comprehensive and Actionable Advice

- A CFP® professional doesn't just focus on investments—they address your entire financial picture, including budgeting, tax strategies, debt reduction, and estate planning.
- You'll leave with a step-by-step roadmap you can confidently follow on your own or revisit as needed.

### 4. Clarity and Confidence in Your Financial Future

- The insights provided by a CFP® professional will help you understand your current financial position and the steps needed to achieve your goals.
- This clarity can reduce stress and help you make informed decisions, even during life's most challenging transitions.

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**5. Fiduciary Commitment and Unbiased Advice**

- CFP® professionals are required to act in your best interest, so their recommendations are always aligned with your goals.
  - You can trust that their advice is objective and not influenced by commissions or product sales.
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**6. Ideal for Life's Major Transitions**

- Whether you're starting a family, changing careers, or preparing for retirement, a CFP® professional can provide targeted advice to help you navigate these pivotal moments.
  - A one-time plan is especially useful during these transitions, offering clarity without the need for ongoing advisory services.
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**7. Flexibility and Independence**

- By working with a CFP® professional, you'll gain the tools and knowledge to manage your finances independently.
  - You'll retain full control over your decisions while having the flexibility to revisit your planner for updates as your needs evolve.
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**8. Tailored for the DIY Financial Manager**

- If you enjoy managing your finances but need professional guidance to build a solid foundation, a CFP® professional can provide a thorough and customized plan.
  - This allows you to avoid the costs of ongoing portfolio management while benefiting from expert advice.
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**9. Transparent, Upfront Pricing**

- A flat fee from a CFP® professional ensures you know exactly what you're paying, with no hidden costs or ongoing charges.
  - You can trust that their focus is on creating the best plan for you, not increasing their own compensation.
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**10. Setting the Foundation for Long-Term Success**

- A CFP® professional helps you build a plan that can adapt to changes in your life and financial situation.
- By addressing every aspect of your finances, they ensure you're well-prepared to achieve your goals and navigate any challenges along the way.



10985 Cody Street | Suite  
220 Overland Park,  
KS 66210  
913-663-2385

[HillsideWealthTeam.com](http://HillsideWealthTeam.com)

## Why Choose a CFP® Professional?

CFP® professionals stand out for their rigorous training, commitment to ethics, and holistic approach to financial planning. Whether you're looking for peace of mind, expert advice, or a roadmap to achieve your dreams, working with a CFP® professional ensures your plan is comprehensive, actionable, and designed with your best interests at heart.

Investing in a one-time financial plan created by a CFP® professional can empower you to take control of your finances and build a secure future. It's a smart choice for anyone who values expert guidance and long-term financial confidence without the commitment of ongoing advisory fees.

*Changes in tax laws may occur at any time and could have a substantial impact upon each person's situation. While we are familiar with the tax provisions of the issues presented herein, Raymond James and its advisors do not offer tax or legal services. You should discuss any tax or legal matters with the appropriate professional.*

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