PLANNING WITH ERIN?

Here's what you need to know.

What I believe.

I'm on a mission to help millennials align their goals with their personal values to better face the financial challenges particular to our generation. Our values aren't all that different from those of previous generations (like boomers, we place Family at #1). But our path to financial success will be vastly different. Why? Pensions are largely a thing of the past. Side hustles are a thing now. And who even knows what Social Security will look like in a few decades? For millennials, good financial advice means information you can act on today. Statistical simulations of what the stock market will look like 30 years from now don't help much when you are juggling saving for a car with repaying your student loans. Tax and estate planning both have their place, but when you have a new baby and a new mortgage, it's kind of important to focus on getting through this month first. That's why I'm focused on helping my own generation. I strive to deliver real-world actionable advice that can begin improving your life immediately.

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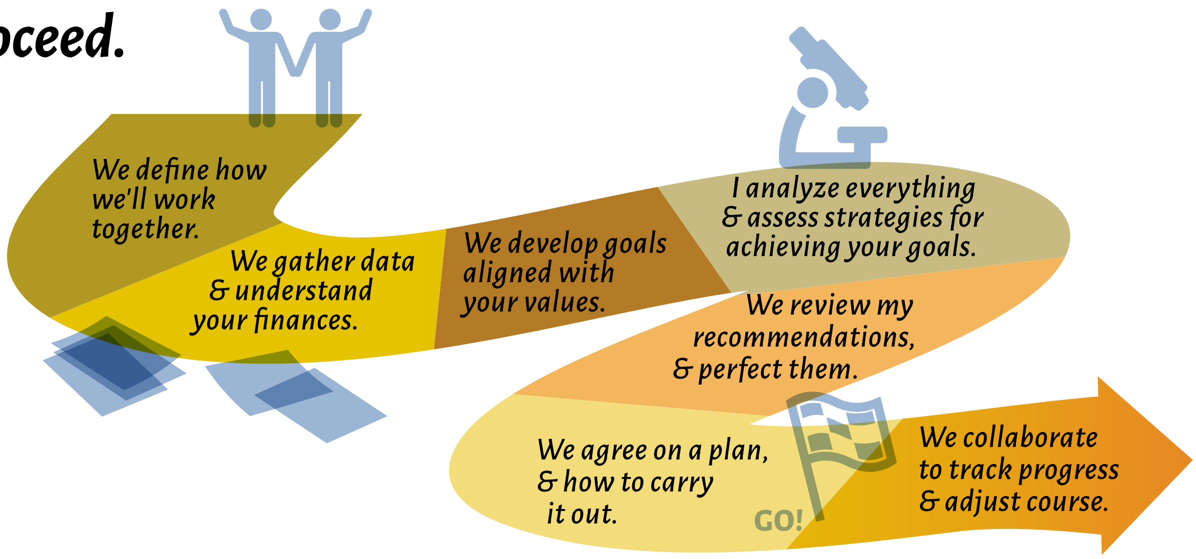
How we proceed.

The financial planning process is one of collaboration, self-reflection, and mentoring.

After these initial steps, my monthly subscription provides you with ongoing support to keep you on your path.



Disclosures.

- I will at all times act in your best interests. I serve my clients as a fiduciary.
- My services are offered on a fee-only basis. The only compensation that I receive is what you pay me.
- Your information will at all times be kept confidential and secure. I never share your information without your written permission.
- If you ask me a question that I can't answer off the top of my head, I will research it and get back to you in a timely fashion with a clear answer.
- I work virtually with clients to arrange meetings around their busy schedules. I strive to return all emails and phone calls within two business days.
- Our relationship depends on your commitment to the financial planning process, and your willingness to
  - provide complete, accurate information.
  - be responsive to information requests, emails, and phone calls.
  - meet virtually and exchange information electronically.

PLAN WITH ERIN
FINANCIAL PLANNING + MORE

learn more at
planwitherin.com