BOGHOSSIAN FINANCIAL & INSURANCE SERVICES

Your Financial Game Plan

Tailored Guidance for Every Stage of Life

PLANNING SERVICES • FOR ATTORNEYS, PHYSICIANS & FAMILIES

	The Front Nine FOUNDATIONS	The Back Nine STRATEGY	The Clubhouse LEGACY
Ideal For	*Starting Out, Gaining Financial Clarity & Building Wealth*	*Life Transitions, Retirement Planning & Strategic Decisions*	*Legacy Planning, Business Continuity & Multi-Generational Impact*
What's Included?	✓ Goals-Based Cash Flow & Debt Planning ✓ Retirement & Investment Strategy Alignment ✓ Insurance & Risk Assessment ✓ Analyze Emergency Reserve ✓ Employee Benefits & Insurance Review ✓ Estate Planning	INCLUDES ALL FRONT NINE SERVICES + ✓ Analyze & Model Major Financial Decisions ✓ Investment Management & Education ✓ Practice & Business Owner Planning (Ongoing Operations) ✓ Multi-Year Tax Planning Strategies ✓ Retirement Income Design ✓ Inheritance & Windfall Navigation ✓ Coordination with Your Advisory Team	INCLUDES ALL BACK NINE SERVICES + ✓ Integrated Cash Flow, Wealth & Liquidity ✓ Equity Comp & Concentrated Positions ✓ Advanced Tax & Estate Strategies ✓ Family Governance & Multi-Gen Planning ✓ Ownership, Income & Entity Structuring ✓ Entrepreneur Guidance (Growth, Exit & Liquidity)
Your Investment	**$1,500 – $3,000***	**$4,000 – $7,500***	**$10,000 – $30,000***

Your Planning Journey	HOLE 1 **The First Tee** Getting to know you	HOLE 2 **Course Mapping** Organizing your finances	HOLE 3 **Reading the Greens** Understanding where you stand	HOLE 4 **The Game Plan** Designing your strategy	HOLE 5 **Playing the Round†** Putting the plan in action	HOLE 6 **Staying on Course** Ongoing guidance

Our Promise ✓ Your Personal Portal + ✓ Dedicated Planning Team + ✓ Trusted Strategic Partners

*Final pricing determined at the end of your initial session based on complexity, scope, and required collaboration.

†Implementation of plan recommendations is not included in the Financial Planning fee; additional fees or charges may apply.

See back of page for important disclosures.

Ready to tee off?

bfiplanning.com

Important Disclosures

Ishkhan Boghossian, MBA
Financial Advisor
Agent, New York Life Insurance Company
CA Insurance Lic# 0H75761

Boghossian Financial & Insurance Services
55 S Lake Ave, Suite 200
Pasadena, CA 91101
747-331-0489
bfiplanning.com

FINANCIAL PLANNING FEES

Financial Planning Fees reflect our typical fee for these services. Financial Planning Fees are typically collected in full at contract signing, though other arrangements are available. The Financial Planning Agreement, which you will sign if you engage in a Financial Plan, will reflect your specific fees.

REGISTERED REPRESENTATIVE & INVESTMENT ADVISER DISCLOSURE

Ishkhan Boghossian is a Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, a Licensed Insurance Agency, and a Financial Adviser offering investment advisory services through Eagle Strategies LLC, A Registered Investment Adviser.

Ishkhan Boghossian is also an agent licensed to sell insurance through New York Life Insurance Company and may be licensed to sell insurance through various other independent unaffiliated insurance companies.

GENERAL DISCLOSURES

Boghossian Financial & Insurance Services is not owned and operated by NYLIFE Securities LLC, Eagle Strategies LLC and its affiliates. Eagle Strategies LLC (Eagle) is an indirect wholly owned subsidiary of New York Life Insurance Company and an SEC-registered investment adviser. Registration with the SEC does not imply a certain level of skill or training. Investment products are not guaranteed and may lose value. No tax or legal advice is provided by Eagle, its IARs or its affiliates.