



OVERVIEW

THE WEALTH COMPASS 2024

SIGNATURE FINANCIAL &
INVESTMENT COACHING

PREPARED BY:

Trevor Alexander, MBA, PMP

Powered By: SNS Wealth

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info@snswealth.co
703-596-8911

About Us



SNS Wealth

Is a Financial Education & Services Company focused on wealth creation and strategy for early career professionals.

Trevor A. Alexander, MBA, PMP, ITIL **Your Money & Investment Coach**

A trusted and experienced results-driven professional.

- Masters' of Business Administration - Finance
- Bachelor's of Business Administration - Information Systems Technology
- Project Management Professional (PMP)
- Licensed Insurance, Disability, and Annuities Agent
- Licensed Realtor in State of Virginia
- Amazon Web Services Cloud Practitioner
- Certified Blockchain Expert (CBE)
- 2024 - Certified Financial Planner
- 2024 - Registered Investment Advisor
- \$1.7 Million Dollar Real Estate Investment Portfolio
- Stock Market & Retirement Investor 8+ Years
- Educated over 10,000 people online

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WHO IS THE WEALTH COMPASS DESIGNED FOR ?



**AMBITIOUS MILLENNIAL
& GEN Z PROFESSIONALS**



Professionals working in **technology, business, healthcare, consulting, engineering, and government.**

Household Income 60K-325K

**IS YOUR WEALTH WORKING AS
HARD AS YOU ?**



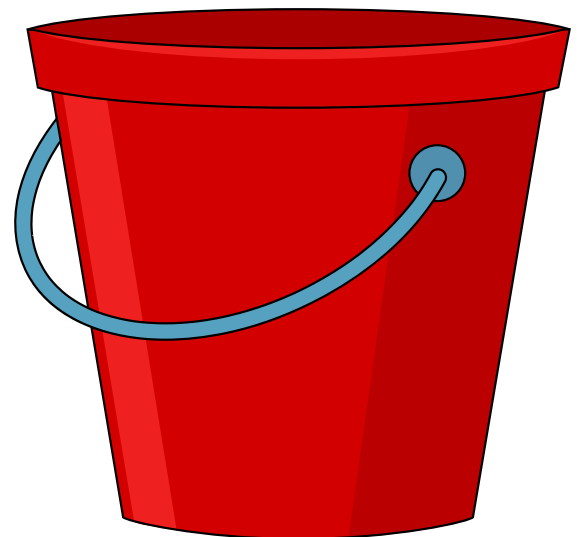
Our Service Price Range:

**From \$0.00 / Free
to \$1,200.00**

Any Questions or Concerns ?



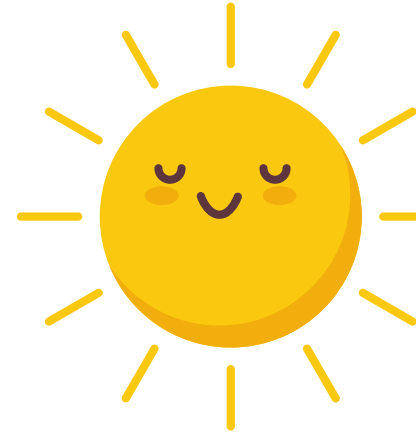
**THE PROFESSIONALS
WE SERVE ARE IN
ONE OF TWO BUCKETS...
WHICH ARE YOU ?**



THEY SEE THE LIGHT BUCKET

Organized. Secure. Intentional.

“I am making more money in my career and want to invest this additional cash.”



I feel like i'm doing fine, but I know that someone who studies personal finance can be beneficial.

I have worked hard and want to set myself up for success over the next 5-10 years.



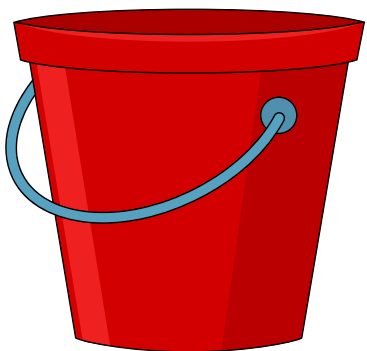
OR THEY FEEL THE HEAT BUCKET

Rushing. Anxious. Regretful.



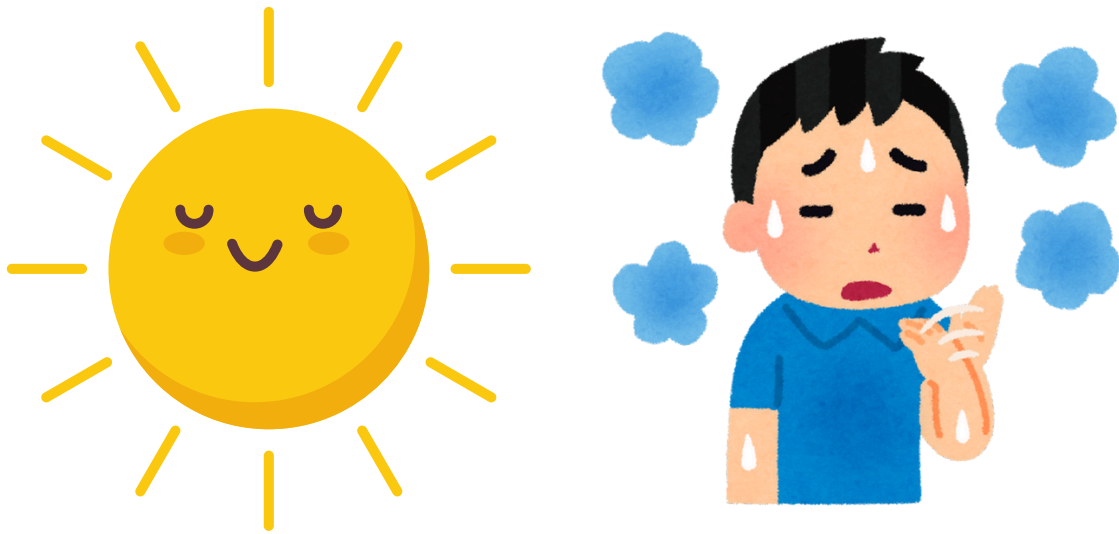
**Im not saving any money and
this is getting annoying !**

**I keep making financial mistakes as
a result of doing it myself**



**My inflation and expenses are
causing concern about bills and
stability moving forward.**

**REGARDLESS IF YOU
SEE THE LIGHT ?
OR FEEL THE HEAT ?**



**LETS MOVE TOWARDS YOUR
DESIRED DESTINATION**



STORIES

Humza S., IT Consultant, 23 Recent College Graduate



“I want to get off to a great start, I need help.”

Humza is fresh out of college and accepted a IT Consultant Role. Living with family, and motivated to make good decisions. **He needed personal help, and saw a lot on social media but wanted a game plan..**

SNS Wealth was able to help get all his investment accounts setup, invest 30% of gross income, and put him on a good track for real estate.

Janae, HR Partner, 28

Millennial Professional & Entrepreneur



“I feel great about everything, I just know I can be even smarter.”

Janae is making great income 5 years into her career as a HR professional. She is a homeowner happy with her finances, but she felt that getting help to **improve her retirement accounts and debt** would be a smart move. **I helped setup a HYSA, Roth, discuss her debt, and pursue her first investment home.**

Calvin, Mechanic / Shop Owner, 49

Family Man & Experience Seeker



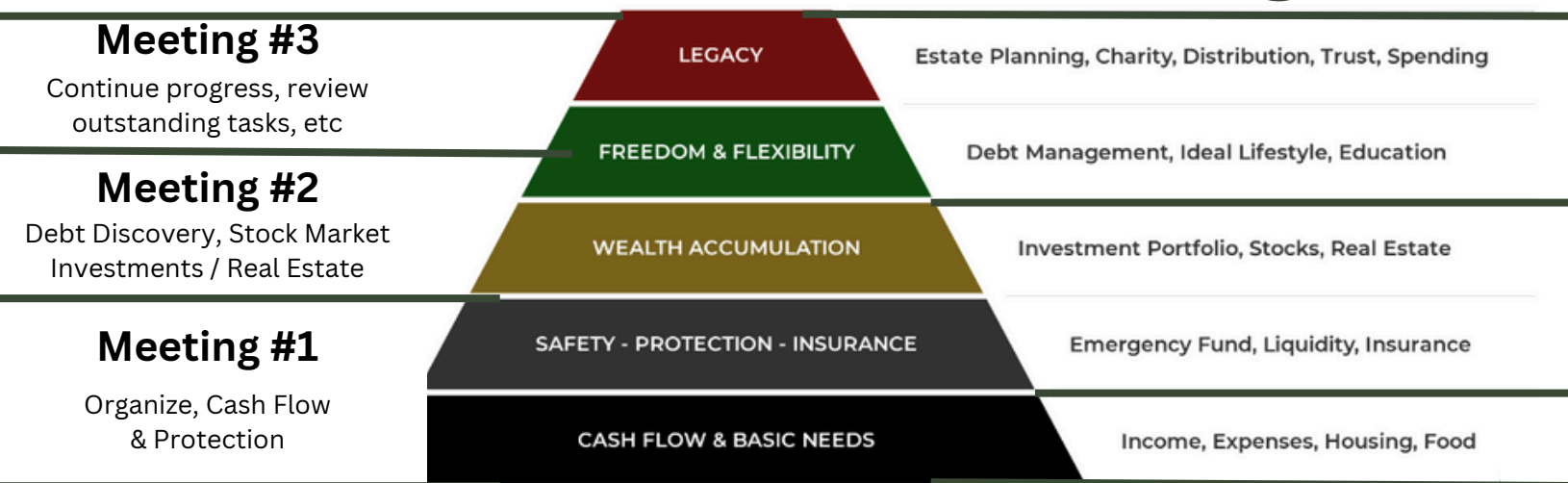
“I never had my finances looked at, I want to invest in a second opinion as I get older.”

Calvin recently **left his employer of 20+ years to start his own shop.** Once his old job gave him access to his six-figure retirement account, he knew it was time to seek guidance on his full financial picture. **I rolled over his funds and updated him weekly on his options.**



All Wealth Compass sessions are founded on the Financial Foundation Pyramid.

100% Virtual Zoom Meetings.



**“ Its important to not skip steps.
I follow this exact approach.”**

**“The Wealth Compass makes sure you
are headed in the right direction
financially.”**

Trevor Alexander, Financial Coach



Example questions the Wealth Compass answers.

Below are some very common questions we see.

Please note, questions we address will always **be specific to the client/family served.**

- Are you taking the right amount of risk ?
- Are you using your income wisely ?
- Do you have the right mix of assets ?
- Are you protected from major life events ?
- What apps and programs should I use ?
- What next steps should I take to get into real estate ?
- How to consider the impact of credit cards on cash flow ?
- How much wealth do you need to make work optional ?
- What stocks should I consider buying ?
- How long will it take to become a millionaire ?
- Should I continue to rent or buy a home ?
- Are your beneficiaries setup on your accounts ?
- Which debts should you pay off first ?
- How much to put into your 401k, TSP, 403B
- How should you approach difficult money conversations ?
- And many more specific to your goals.



Cash Flow

We optimize your cash flow so you can budget better, save more, and invest within your means.

Insurance

We optimize your insurance so you do not have to spend all of your savings/investment in case of an accident or early death.

Investments

We optimize your investments so your money is growing at a faster rate and making you an owner.

Debt

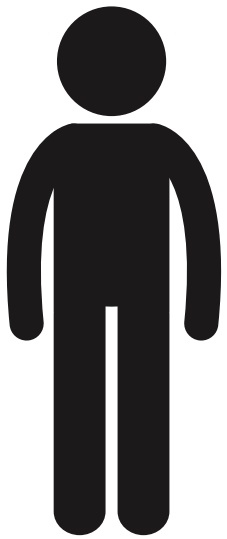
We optimize your debt so your money is not only going towards expensive interest, but being used to build more wealth.

Estate

We optimize your estate planning so your beneficiaries and documents are set, and your hard work does not get lost

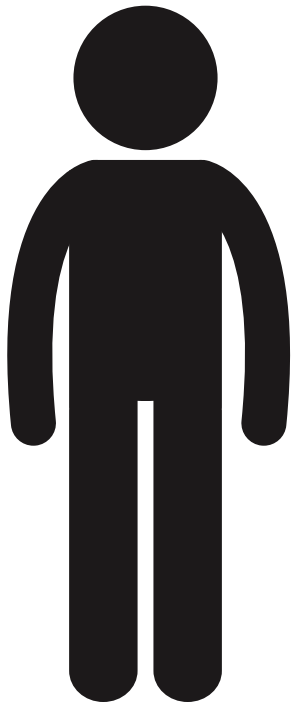
Misc, Organization

We address other options that may come up along the way.



The Estimated Lifetime Value Of The Wealth Compass

**\$30,000 to
\$2.0+ Million**
Increase Net Worth



1. Cash Flow Savings
2. Optimized Spending
3. Reduction in Interest Payments
4. **Reduction in fees on retirement accounts**
5. **Compounding Interest on Stocks**
6. **Increased Portfolio Value due to more contributions**
7. Equity Gains in Real Estate
8. Life Insurance Payouts
9. Avoiding Probate
10. Buyers remorse / bad decisions
11. Divorce / relationship issues
12. Mental Clarity and Fulfillment





FIVE (5) YEARS

Investment details

Initial deposit

\$20,000

Contribution amount

\$1,500

Contribution frequency

Monthly

Annually

Years of growth

5

Years

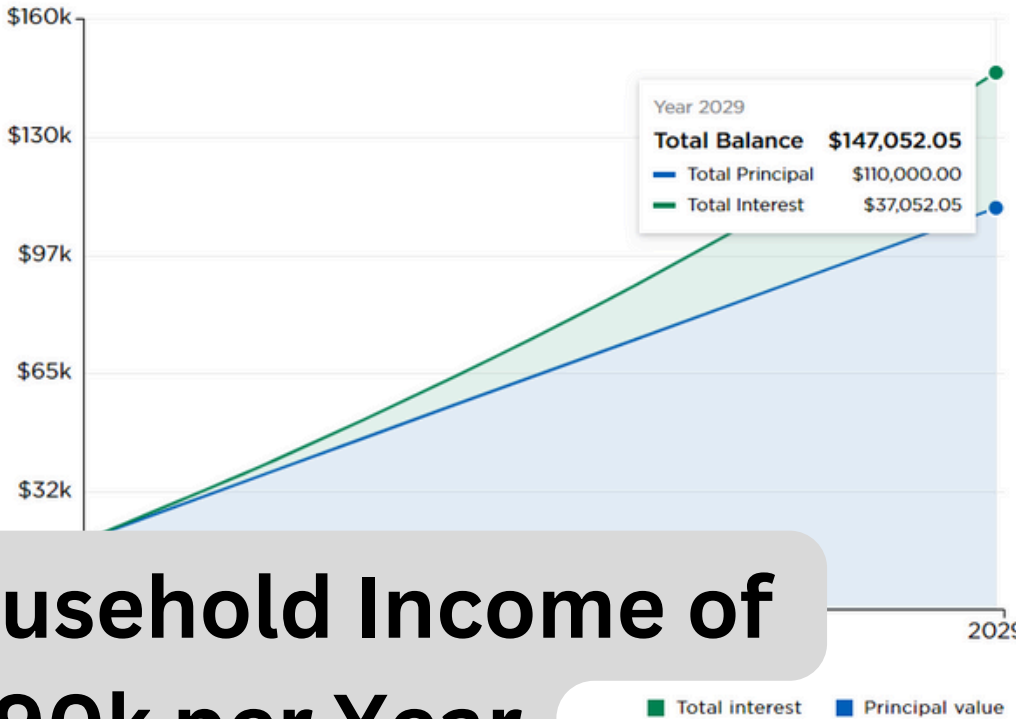
Estimated rate of return

10%

Compound frequency

Annually

Total Balance
\$147,052.05



For Household Income of
90k per Year

FIFTEEN (15) YEARS

Investment details

Initial deposit

\$20,000

Contribution amount

\$1,500

Contribution frequency

Monthly

Annually

Years of growth

15

Years

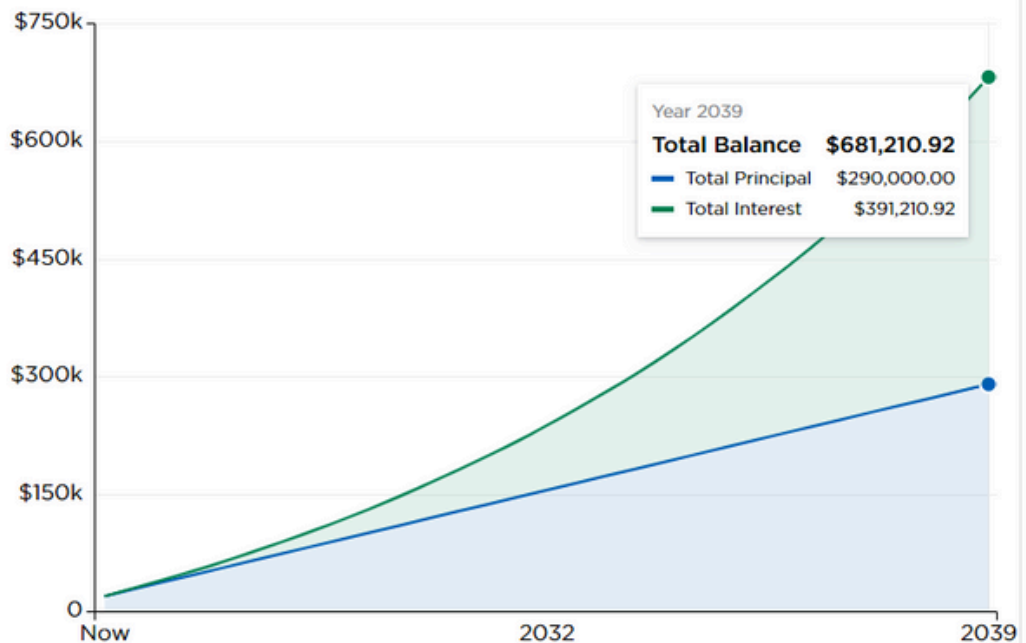
Estimated rate of return

10%

Compound frequency

Annually

Total Balance
\$681,210.92





Three Options for You to Choose From

Option A - Do Nothing / Do It Yourself

Take no action on any of the items we discussed.
You can always take the education and implement it yourself.

Option B - Discuss a Custom Proposal

Pricing ranges from \$250-\$850 on average.
Payment plans available.

- Receive a personalized quote to any topics that you shared.
- Example get an investment portfolio review, discuss a budgeting and cash flow game plan, etc.
- Custom meeting plans and defined projects

Option C - Start Your Wealth Compass

Price is \$1,200.
Payment plans available.

- Our premiere service. We help your full financial picture.
- 10% credit off for healthcare workers, veterans, and educators.
- We cover the Monarch Money App on your behalf for 6 months.
- After program, client can always book time for new proposal.
- Credit Repair and Estate Services are not included.

WE STAND BY OUR SERVICE

MONEY BACK GUARANTEE



If you complete all the checkpoints of our process and are not more confident about your financial future. **I will refund 100% of your Wealth Compass investment and continue to work with you.**



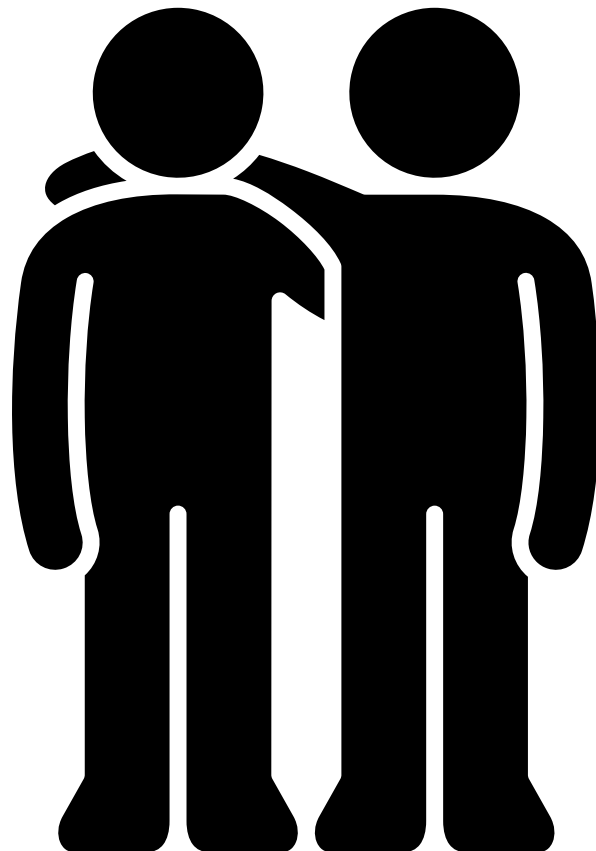


Who do you know that wants to grow wealth ?

For Wealth Compass

Gift a Partner at

No Additional Cost



Add one (1) person to your Wealth Compass Plan and they will receive the same benefits as you !





“IT'S WHAT YOU LEARN AFTER YOU KNOW IT ALL THAT COUNTS.”

FUN FACTS

100+ FAMILIES SERVED

15,000,000 MILLION INVESTED

90,000,000 MILLION INSURED

50,000+ EDUCATED ONLINE

15+ SCHOOLS SPOKEN AT

I LOOK FORWARD TO
SERVING YOU, LETS THRIVE
FINANCIALLY !



What Happens Next

Step 1:

First, what are your thoughts ?

Lets answer any questions you may have ?

Step 2:

Next, take time to decide which approach works best for you. You will receive an email to get started.

Step 3:

Once the work is completed, we provide the financial tools and resources for continued support in the future in case you ever need more help or accountability.



SNS Wealth

Proposal for James Smith

Financial Education & Services
Woodbridge, VA 22314

SNS WEALTH | Financial Education & Services

Alexandria, VA 22314
703-596-8911
info@snswealth.co
www.snswealth.co

Proposal For: Insert Name.

Expiration Date: xx/xx/xxx

Quote # - 13-154

Service

Option A -

Project Completion: xx/xx/xxx

I. Cash Withdrawal

- \$15,000 withdrawal for a personal project, noting tax implications.

II. Investment Strategy for \$85,000

- Assess risk tolerance. Stress diversification and tax efficiency.
- Educated on asset allocation (e.g., stocks, bonds).
- Educate various options investment vehicles (e.g., stocks, bonds, ETFs).

III. Investment Plan

- Present portfolio breakdown and review frequency of contributions

IV. Risk Management

- Emphasize the need for an emergency fund.
- Review and adjust insurance coverage as necessary.

V. Retirement Planning

- Discuss long-term retirement goals.
- Encourage IRA contributions, if eligible.

VI. Monitoring and Review

- Schedule regular meetings to review the plan.
- Provide market updates and insights.

VII. Conclusion

- Summarize key points. Outline immediate action steps.
- Share contact information for further questions.

VIII. Access and Support

- Unlimited messaging access
- Schedule a call once a month to work towards goals

Custom Pricing

Financial Coaching

- **Income Utilization:** Advising on the wise use of income for maximum financial growth and stability.
- **Credit Management:** Analyzing the impact of credit cards on cash flow and providing strategies for managing credit.
- **Customized Financial Planning:** Developing tailored financial plans specific to clients' goals and circumstances.
- **Difficult Financial Conversations:** Coaching clients on how to approach difficult money conversations with family or partners.

Investment Education

- **Risk Assessment:** Evaluating if clients are taking the right amount of risk in their investments.
- **Asset Allocation:** Ensuring clients have the right mix of assets in their investment portfolios.
- **Wealth Planning:** Calculating how much wealth is needed to make work optional and planning accordingly.
- **Stock Recommendations:** Providing insights and recommendations on which stocks to consider buying.
- **Debt Management:** Advising on which debts to pay off first and how to manage debt effectively.
- **Retirement Planning:** Guidance on how much to contribute to retirement accounts like 401(k), TSP, or 403(b). Rollovers from previous and existing account as well.

Real Estate Services

- **Market Analysis:** Detailed analysis of the real estate market to help clients make informed decisions.
- **Rent vs. Buy Analysis:** Evaluation of whether clients should rent or purchase a home based on their financial situation and goals.
- **Property Investment Strategies:** Guidance on real estate investments to build and diversify portfolios.

Life Insurance Services

- **Risk Protection:** Ensuring clients are protected from major life events through appropriate life insurance coverage. Term life, and permanent life available.
- **Beneficiary Setup:** Assistance in setting up and reviewing beneficiaries on accounts to ensure assets are distributed according to clients' wishes.

Personalized Consultations

- **Goal-Oriented Services:** Offering many more services specific to clients' individual goals and financial situations.

THE E-SAVERS MODEL

TO MILLIONS IN ASSETS

E – EDUCATE

FOCUS ON INCREASING YOUR VALUE IN THE MARKETPLACE AND SELF-AWARENESS: ENHANCING YOUR SKILLS AND UNDERSTANDING WHAT YOU TRULY WANT MAKES FINANCIAL PLANNING EASIER.

S - SAVINGS RATE

AIM TO SAVE A SIGNIFICANT PORTION OF YOUR INCOME (10-30% OR MORE) TO BUILD WEALTH FASTER AND ACHIEVE FINANCIAL GOALS.

A - AUTOMATE

AUTOMATE YOUR FINANCES: SET UP AUTOMATIC TRANSFERS TO SAVINGS AND INVESTMENT ACCOUNTS TO ENSURE CONSISTENT SAVINGS AND PREVENT OVERSPENDING.

V - VARIETY

DIVERSIFY YOUR INVESTMENT ACCOUNTS: SPREAD YOUR INVESTMENTS ACROSS DIFFERENT ASSET CLASSES, ACCOUNT TYPES, AND SECTORS TO REDUCE RISK AND BALANCE YOUR PORTFOLIO.

E - EQUITIES

INVEST IN EQUITIES: STOCKS AND ETFS OFFER HIGHER RETURNS AND ARE ESSENTIAL FOR GROWTH, DESPITE THEIR HIGHER RISK.

R - REAL ESTATE

INVEST IN REAL ESTATE: REAL ESTATE PROVIDES INCOME AND POTENTIAL APPRECIATION, DIVERSIFYING YOUR PORTFOLIO WITH TANGIBLE ASSETS.

S - SUSTAINABILITY

MAINTAIN FLEXIBILITY: BE ADAPTABLE IN YOUR FINANCIAL STRATEGY TO ADJUST TO LIFE CHANGES AND CIRCUMSTANCES EFFECTIVELY.