



Domain Planning as a Service Overview



Purpose

A fully **white-labeled centralized financial planning solution**, enabling you to serve clients without impacting firm resources. Our solution is designed to provide **actionable steps**, ensuring clients feel empowered to achieve their goals, and provide clients with **access to our expert financial advisors** without depleting your firm's resources.

Who Domain is for

Advisors who wish to serve clients with a **better financial planning solution**. Rather than endless **pages of analysis**, our plans are ideally suited for **smaller account** and **mass affluent** clients who are looking for clear actionable steps along their financial journey.

Topics covered

Goal Setting

Help prioritizing goals, values, and dreams. Determine the ideal timeline and feasibility of each priority.

Cash Flow Analysis

Review historical expenses and current income sources. Create a spending plan for the year ahead. Maximize rate of return on your cash. Build an emergency fund. Plan for large expenses.

Retirement Savings

Optimize 401(k) and IRA savings strategies. Determine how much is needed to save to reach ideal retirement or financial independence goal. Consolidate retirement assets to ensure they are all working cohesively together.

Investments

Education and recommendations for getting started with investing. Professional review of current portfolio and asset allocation. Diversification strategies for concentrated positions.

Investments and Equity Compensation

My company's stock price shot up this year. How much should I sell and how should I allocate the proceeds? What should I be doing with my RSU's to get the most out of them as they vest?

Tax Planning

What should I be doing this year to optimize my tax strategy and keep more money in my pocket? Should I do a Backdoor Roth?

Home Affordability

Determine affordability of home purchase. Review the current interest rate environment and how it affects home purchase versus renting calculation. What home expense fits with other budget constraints, spending habits, and investments available for down payment?

Debt Management

Review of current loans including interest rates, monthly payments, balance remaining. Strategic plans for paying off debt in the most efficient way. Help prioritizing what debt to pay off first. How to utilize a home equity line of credit. How to build credit and maintain a great credit score.

Example questions we help answer



What are your biggest spending categories and do they truly align with your dreams, values, and goals?



How much do you need to save each month to retire early and be financially independent?



How much should you budget for a house purchase or another large, one-time purchase?



How should your accounts be invested given your unique goals and timeline?



What is the best way to set your finances on autopilot so you don't have to worry about them day-to-day?



What type of investment account should you be using for each goal?

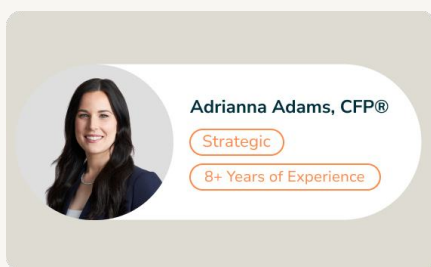


How much should I budget for a new home or house renovation?



What type of investment account should you be using for each goal?

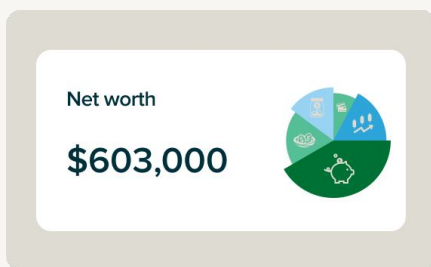
How does it work?



Step 1

Client Questionnaire: Clients share their goals, priorities, and situation with us.

Upload Financial Documents Quickly & Securely: Clients can easily share needed information through our secure portal.



Step 2

Domain Advisor Creates a Customized Plan: They'll analyze all aspects of clients' financial life to develop a customized financial model and a step-by-step roadmap focused on their top priorities.

To-Do	Impact
<ul style="list-style-type: none"> Open a Texas College Savings Plan and invest in the 2036 target date fund. Contribute \$640 per month to this account. Sell the Moderna, Chewy and Shopify stock in your Fidelity account to tax loss harvest. 	<ul style="list-style-type: none"> This will fully fund all four years of Charlotte's college education. The losses from these stocks will offset the tax bill from selling Nvidia at a gain.

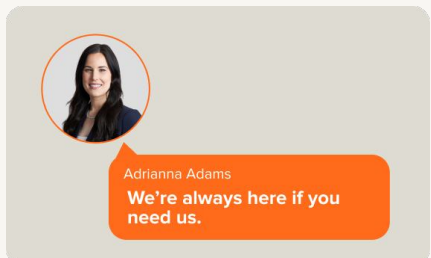
Step 3

Plan Review With Domain Advisor: The Domain advisor goes through the plan in a 90-minute delivery session with the client so they understand the plan, answer questions, and provide specific action items to work on.



Step 4

Coaching Sessions: Your advisor help you execute your action items over a 60-minute Coaching Sessions throughout the year or answer any other burning questions.



Step 5

Access to Ongoing Support: Clients get unlimited email access to their advisor for any questions that arise after the Plan Review or in between Coaching Sessions.

What's included

Initial Financial Plan

We get to know the client and their goals and gather all the information needed to build a personalized financial plan and model. Clients meet with their advisor to go over the final plan and the action items for a 90 minute meeting. From there, clients work through the action items and can tap into their advisor either through email support or using one of their four annual coaching sessions.

4 Coaching Sessions

Meet with your dedicated CFP for (4) 60-minute coaching sessions for either milestone-based quarterly meetings or as ad-hoc questions, decisions, or life events arise. Examples include:

- Tax planning
- Equity or RSU compensation strategy
- Real estate property analysis
- Help with implementing action items
- Insurance planning
- Saving and investing strategies for income changes

Annual Recalibration

Client tell us what's changed in their life. We adjust or create new goals, review investment portfolio and asset allocation, and update the Plan.

Plan Update and Delivery Meeting

We update your financial model, create new action items, and answer all of your most pressing money questions.

Unlimited CFP Email Support

Send your CFP emails to get smaller questions answered in between your Coaching sessions.

Deliverables

Written financial plan

To-Do	Impact
<ul style="list-style-type: none"> Move the cash in your Chase account to a 5% APY high yield saving account. 	You are only earning 0.1% at Chase. You are missing out on earning an additional 4.9% on your cash.
<ul style="list-style-type: none"> Current investments are over weighted in US large cap. In your Fidelity account, sell 10% of IVV and purchase 5% of VEU and 5% of IJR. 	Over the next 4-5 years , with modest returns of 6%-8% , you will have a 20% down payment on a \$1.5 million home .
<ul style="list-style-type: none"> Reduce shopping and dining out, so that your overall monthly spend is less than \$18,000. 	This will allow you to save for a house faster and take the trip to Italy this year.

The written financial plan is a detailed analysis of clients most important financial goals.

The action items serve as their check list of what they need to do to achieve your goals.

Typical length: 3-5 pages

Custom financial model

A financial model details all of the data and number crunching done behind the scenes that leads us to the personalized recommendations.

The model serves as a benchmark for tracking net worth, understanding current cash flow and ideal spending plan, real estate, and consolidating all of investments and bank accounts in one place.



Cost

Annual Membership Cost

\$3,500



Domain's 100% Satisfaction Guarantee

Get Domain and if you don't love it, we'll give you your money back!

[Learn more](#)

<https://domainmoney.com/assets/library/satisfaction-guarantee>

