



Domain Annual Membership Overview



Purpose

A membership designed to help you proactively plan, continuously make smart money moves to progress toward your goals, get answers to all of your burning financial questions (and uncover the questions you should be asking but might not be), and have ongoing access to your dedicated CFP.

Who Domain is for

Clients with an existing plan that want hands-on CFP support to navigate all your big financial decisions and milestones throughout the year (i.e. tax planning, equity compensation, investing, insurance, real estate) or anyone experiencing a big life event (i.e. home purchase, having child, relationship status change, new job, relocation, etc.).

What's included

Annual Recalibration

Tell us what's changed in your life, adjust or create new goals, and identify upcoming topics that need CFP guidance.

Plan Update and Delivery Meeting

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

Annual Investment Review

We review your investment portfolio and asset allocation and provide recommendations to realign your portfolio with your risk tolerance, diversify concentrated positions, and maximize overall performance.

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

Unlimited CFP Email Support

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

Sample questions Domain can support you with

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?

Cash Flow

I got a 20% pay raise or large bonus. How does this change the way I should be saving, investing, and spending? What expense categories do I need to be better about managing next year?

Real Estate

Based on my current cash flow and savings, how much should I budget for a house renovation or new investment property? What is the smartest way to fund it?

Insurance

Do I have the right amount of insurance coverage based on my current life stage?

Education Savings

What account(s) should I be using to save for my kids college? How much should I anticipate needing for private vs. public school?

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!

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