SCHOLAR ADVISING
SIGNATURE COACHING

Introducing the Signature Experience

Exclusive by design. Personalized by intent.

What Makes the Signature Experience Different

Not a pricing model. A leadership model for your financial life.
The Signature Coaching Program was created in response to a simple, recurring request from our clients:

> *"I'm looking for ongoing, proactive, and bespoke advice—without giving up control of my accounts or paying for investment management services I'm not getting additional value from as my portfolio grows."*

This experience isn't a service add-on. It's a complete shift in how financial advice is communicated and delivered with premium benefits through exclusive access and value not accessible in a package found anywhere else. This program is designed to give your financial picture the sustained, strategic attention it deserves.

With our Signature Coaching Program, you don't get a static plan or a reactive advisor. You gain a **personal CFO** and a dedicated team that leads, coordinates, and evolves with you and your financial life. We advise on complexity to proactively address every financial angle from: taxes, estate planning, investments, business purchases and exit strategies, real estate, insurance, liquidity events, and preparation for generational wealth transfer by including your family members with discretion and intention. And we do it with clarity, not commissions.

Where traditional firms charge for what you've already built, we price based on what you need to build next.

What Sets the Signature Experience Apart
Access without friction
You don't submit support tickets. We work with you to schedule the conversation—on your time, when it matters.

Expertise with depth
A full specialty advisory team reviews your situation and contributes insights with depth and multiple perspectives—not just a single advisor working alone or encountering issues without expertise.

Coordination across silos
We initiate contact with your CPA, estate attorney, and insurance providers—so you don't have to repeat yourself or manage a team of specialists.

Continuous engagement
We don't disappear after a plan delivery. You'll hear from us monthly, and meet quarterly or more—always with purpose.

A New Category of Service
This isn't asset management. This isn't traditional planning. **This is a high-touch, full-spectrum partnership designed for people with complex financial lives and no time to waste.**

We believe that wealth deserves structure.
That planning should be ongoing.
That the value of advice is not in how it's billed—but in how it's lived.

Your Annual Financial Strategy—Done for You

A proactive calendar tailored to your financial life
As your personal CFO, we don't wait for questions—we bring the right ones to you, at the right time. Our Signature Coaching Calendar maps out the critical moments of the year, ensuring you receive timely guidance, forward-looking strategies, and a cadence that turns what was once static planning into a dynamic, living strategy.

An Overview: Example Monthly Strategic Agenda

Month	Primary Focus
January	Annual strategy reset & goal alignment
February	Tax strategy with CPA collaboration
March	Investment review & rebalancing
April	Insurance & real estate planning
May	Estate projections & mid-year gifting
June	Mid-year review + SFA Finance Conference family access
July	Education & generational wealth planning
August	Optional pause or client-directed session
September	Year-end tax readiness
October	Open enrollment & benefits coordination as needed
November	Capital gains, gifting, portfolio updates
December	Annual recap, next-year goals, scenario planning

Quarterly deliverables include:

- ✓ Updated plan snapshot and cash flow overview
- ✓ Coordination outreach to CPA and attorney
- ✓ Customized meeting agenda with follow-up items
- ✓ Real-time alerts for market or tax changes

A Team Built for Depth, Continuity, and Expertise

Your advising team won’t disappear. Your plan won’t go stale.
At Scholar Advising, we don’t rely on generalists. We are a purpose-built team of PhDs, CFP® professionals, and specialists in high-net-worth planning, working in collaboration—not in silos—to guide complex financial lives. Our work begins where conventional advice ends.

Our team specializes in serving individuals with portfolios and lives that demand more than investment advice.

A Purpose-Built Team for High-Stakes Planning

Collaborative Insight, Not One-Person Oversight
Your planning is reviewed by multiple advisors with deep expertise in tax, investments, estate, and executive compensation—ensuring no detail is overlooked.

Continuity You Can Count On
Because we operate as a coordinated team, your relationship is built to last. If one advisor is unavailable, your plan and your progress stay in motion.

Proactive Oversight, Not Reactive Check-Ins
We lead your planning cadence, anticipating what's next and surfacing opportunities before they become missed.

A CFO for Your Financial Life
We step into the role of personal financial executive—managing the strategy, vetting outside professionals, and coordinating every piece of your plan across tax, legal, and investment domains.

The Investment in a Signature-Level Partnership

This isn't asset management. This is financial leadership.

Our Signature Coaching Program was created for those who want complete financial clarity—and the kind of professional partnership typically reserved for ultra-high-net-worth families.

Instead of charging based on the size of your investment portfolio, our pricing reflects:
✓ The depth of planning
✓ The responsiveness and prioritized access to our team
✓ The sophistication of modeling and coordination
✓ The complexity of your life—not your account balance

Monthly Retainer
The ongoing monthly retainer starts at $4,000 and is determined by your unique needs and financial complexity. Your specific monthly amount will be set in a custom Signature Coaching Program proposal provided alongside your initiation fee balance (if any).

Initiation
The initiation fee is $15,000. If you choose to enroll in the program within 30 days of your initial plan delivery, the cost of your plan will be applied to the initiation fee, and only the remaining balance will be due. For initial plans that exceeded $15,000, the initiation fee is waived.

Enrollment Window
Enrollment in the Signature Coaching Program is open for 30 days following your initial plan or annual renewal delivery. This ensures a seamless onboarding experience using current data. Outside of this 30-day window, beginning a new engagement requires payment of the full $15,000 initiation fee to start with fresh data and strategy alignment.

Subscription
Your ongoing monthly subscription begins the month after enrollment. You may cancel your program at any time by providing notice via email.

The Investment in a Signature-Level Partnership

Ongoing Partnership Benefits
Once your plan is in motion, our ongoing services are designed to evolve with your life—delivering strategic insight, continuity, and peace of mind.

Included in your ongoing partnership:

Strategic Oversight
- Two semi-annual strategy meetings and full plan updates *(valued at $10,000)*
- Additional scenario planning and proactive modeling throughout the year
- Quarterly rebalancing and ongoing account monitoring
- Regular account reviews during critical market events
- Annual summary book and real-time net worth dashboard

Cash & Tax Management
- Proactive cash flow and liquidity strategy
- End-of-year tax projection coordination

Family & Legacy
- Combined family meetings to discuss legacy goals and gifting strategies
- Comprehensive financial plans for heirs *(valued at $9,000–$27,000)*

Exclusive Access & Support
- Concierge scheduling with same-day or week-of team access
- Priority access to your full advisor team—no single point of contact risk
- Support for spouses before and during major life events
- Communication across team members for continuous care and coordination

Signature Coaching Experiences
- Private client-only events with complimentary admission for two family guests *(valued at $6,000)*
- Exclusive Signature Coaching webinar series and monthly newsletters

Planning Calendar
- Full-service calendar of personalized action items to ensure clarity, progress, and accountability

Structured to Maximize Annual Strategic Service Value
Actual value delivered varies by family complexity. Our high-touch model is intentionally designed to unlock nonlinear value when decisions matter most.

Let's Talk

Because your wealth deserves concierge-level care.

The Signature Coaching Program isn't built for everyone, and that's intentional.

It exists for individuals and families navigating complex, high-stakes financial lives—those who need more than investment advice or templated plans.

When your wealth reaches a certain level, you deserve a partner who brings more:

- ✓ Foresight to anticipate what's ahead
- ✓ Coordination across every service professional in your life
- ✓ Immediate access when decisions can't wait
- ✓ Concierge family office support to know your heirs are taken care of and well prepared to receive and steward your wealth

You shouldn't have to chase your advisor.
You shouldn't have to repeat yourself.
And you should never wonder if anyone is thinking about your financial future until you call.

Let's explore whether this level of partnership is right for you.
No pressure. Just clarity.

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