ZENITH
WEALTH PARTNERS

CASE STUDY

Successful early-career professional.

Comprehensive Planning

Investment Management

AT A GLANCE

- Cash Flow & Budgeting
- Post-Secondary Planning
- Retirement Planning
- Estate Planning
- Investment Planning

CLIENT OVERIVEW - "HOW IT STARTED"

Fredric is a single IT Consultant for a small tech start-up. The job is well-paying but has a generous allotment of RSUs with lower cash compensation. He did not expect to receive all this wealth in RSUs and is overwhelmed by the process. He came to us in order to save him some time and consolidate his multiple accounts from previous employers.

Fredric has a student loan balance that he is looking to pay down. He knows there are impacts if he pays it down quickly, but also hates his debt and hates holding it. He heard about Zenith through other clients in the start-up community.

Flexiblity **Trust**

Simplicity **Inclusivity**

THE SOLUTION - "HOW IT'S GOING"

Fredric recently met with the Zenith team for his one year check-in. He is extremely pleased with the strides we made towards his financial independence. His financial planner helped him create a cash flow strategy and budget with his values and goals in mind. He enjoys the ability to contact his planner as needed.

During the cash flow analysis, they talked about strategies for his RSUs and a monthly savings plan. Zenith educated Fredric on the roll-over process, and he decided to roll it over into an IRA because he wants to be invested more aggressively than his 401ks.

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