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Brookhaven Wealth Management provides financial planning, investments, & insurance to young families, the self-employed, and aspiring retirees. Be sure to visit our website through which you can inquire about our services, sign up for our e-newsletter, or schedule a complimentary consultation.

Consider our offers below for **2025 Brookhaven Bolt Participants**.

20% off the first year of our Financial Planning Retainer Program

Some people just starting out don't have the investments yet for an advisor to oversee but still have and need financial planning services. Normally \$1,000/yr, you will get 20% off this service for the first year. Included is 3 hours/yr of dedicated time, ongoing guidance, and full access to our financial planning software, designed to help you make better informed decisions as you start working toward achieving your goals.

20% off fee for a standalone Comprehensive Financial Plan

Some people may wish to work on their own, investing their money or acquiring insurance but need a review or an initial plan designed for them to follow.

Here we use our industry leading financial planning software to create a customized financial plan that provides the guidance and recommendations you need to help you work toward achieving your financial goals. Normally \$2,500 you will get 20% off this service.

20% off our Investment Advisory Fee for the First year

For those who ultimately would like ongoing management of their investment assets as well as financial planning services we charge a fee based on the assets we oversee for you.

This discount will vary from client to client based on the size of the portfolio we oversee so please contact us for details about our fee schedule.

Chris Cosenza CFP®, AIF® is an Investment Advisory Representative offering Securities and Advisory Services through UNITED PLANNERS FINANCIAL SERVICES, Member FINRA/SIPC. Brookhaven Wealth Management and United Planners are independent companies.