



**YOUR  
GOPLAN  
GUIDE**

**Hi there.  
This is your own  
personal guide to  
GoPlan 101.**

In this guide you will find **Recommended Financial Courses, Content and Services** that we think will benefit you based on the answers from your online profile.

You will find step-by-step instructions to **set up your Financial Planning Platform** and learn how to **schedule a call with a GoPlan 101 Coach.**

FOLLOW. LIKE. SHARE.



# WE RECOMMEND THE FOLLOWING FINANCIAL COURSES:



GoPlan 101 offers Financial Courses to strengthen your knowledge on a variety of topics.



Learn the right time to claim Social Security, how to avoid scams, and make the right decision for your future!



Learn the different ways to get Medicare and the different services that are covered.



Learn how much you should save for retirement, when to retire, and how to maintain your budget during retirement.



In our Life Insurance course you will learn about the different types of life insurance and how much you will need.



Know your options when it comes to Long-term Care. Learn the risks and understand how to handle the often overlooked costs.



Enroll in this course to learn about estate planning, wills, and trusts.

 Click on any image to enroll in the course!  
Or go to our main menu > Resources > [Financial Courses](#)

# WE RECOMMEND CONNECTING WITH OUR PARTNERS:

**GO**  
Plan 101

GoPlan 101 provides a network of service partners that can help you implement your plans. When you connect with one of our partners through our site, you'll receive free consultations, discounts, and more!



### **Social Security Experts**

Our partner helps you learn how to maximize your Social Security. They make it easy! You can speak with an expert who can advise you on how to make the best choices.



### **Certified Medicare Agent - eHealth**

Our qualified specialists help people find Medicare Insurance coverage that works for their personal needs. This 'one-on-one' service is only available in certain states.



### **Health Insurance Consultant**

Our partner offers a variety of benefit solutions tailored to meet your needs.



### **Retirement Income Advisor**

Are you thinking about how to guarantee income during retirement? Our partner is a financial advisory firm that can answer your questions about preparing for, and maintaining cash flow during retirement.



### **Estate Planning Platform**

Our partner is a technology company with legal support and estate attorneys. Their platform makes the estate planning process as simple as it can be.



### **Estate Attorney**

Our partner is a business and estate lawyer who handles all aspects of estate planning and business law for business owners and their families.



### **Life Insurance Advisory**

Our partner is an independent financial advisory firm that can answer your questions about Life Insurance and how it fits in your estate plan.



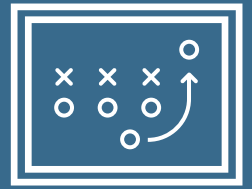
### **Online Term Life Insurance**

Our partner provides term life insurance quotes and an easy, direct way to explore and purchase term life insurance.



**Click on any image to visit a partner!**  
**Or go to our main menu > Resources > Network**

## SCHEDULE A CALL WITH A FINANCIAL COACH:



GoPlan 101 offers conflict-free coaching. YOU are the focus and YOUR needs come first. Connect with a coach when you need to talk things through or get 'one-on-one' attention.

Once logged in you can click on the '**Talk with a Coach**' button in the top right corner of every page, or you can click on the one below!



## STEPS TO SET UP YOUR FINANCIAL PLANNING PLATFORM:



### 1. Click Here.

You'll be brought to our financial planning page offered by First Capital, one of our partners.

### 2. Enter your age, and income and click

Let's Get Started →

### 3. Choose a goal, fill out the questions, and click

Next Step →

### 4. Enter your name and email address and click

Submit Request →

5. Within the next 24 hours you'll receive an email from [notification@emoneyadvisor.com](mailto:notification@emoneyadvisor.com) with a link to your Financial Plan.

For future logins, go to GoPlan 101's Main Menu > Financial Planning Software > Login.