

**We are in business to  
improve America's  
Financial Wellness**

**Planning your financial  
future one nest at a time**

[WWW.CBAPLAN.COM](http://WWW.CBAPLAN.COM)



**Your Guide to Financial Freedom**

# Your Journey to Financial Wealth and Security

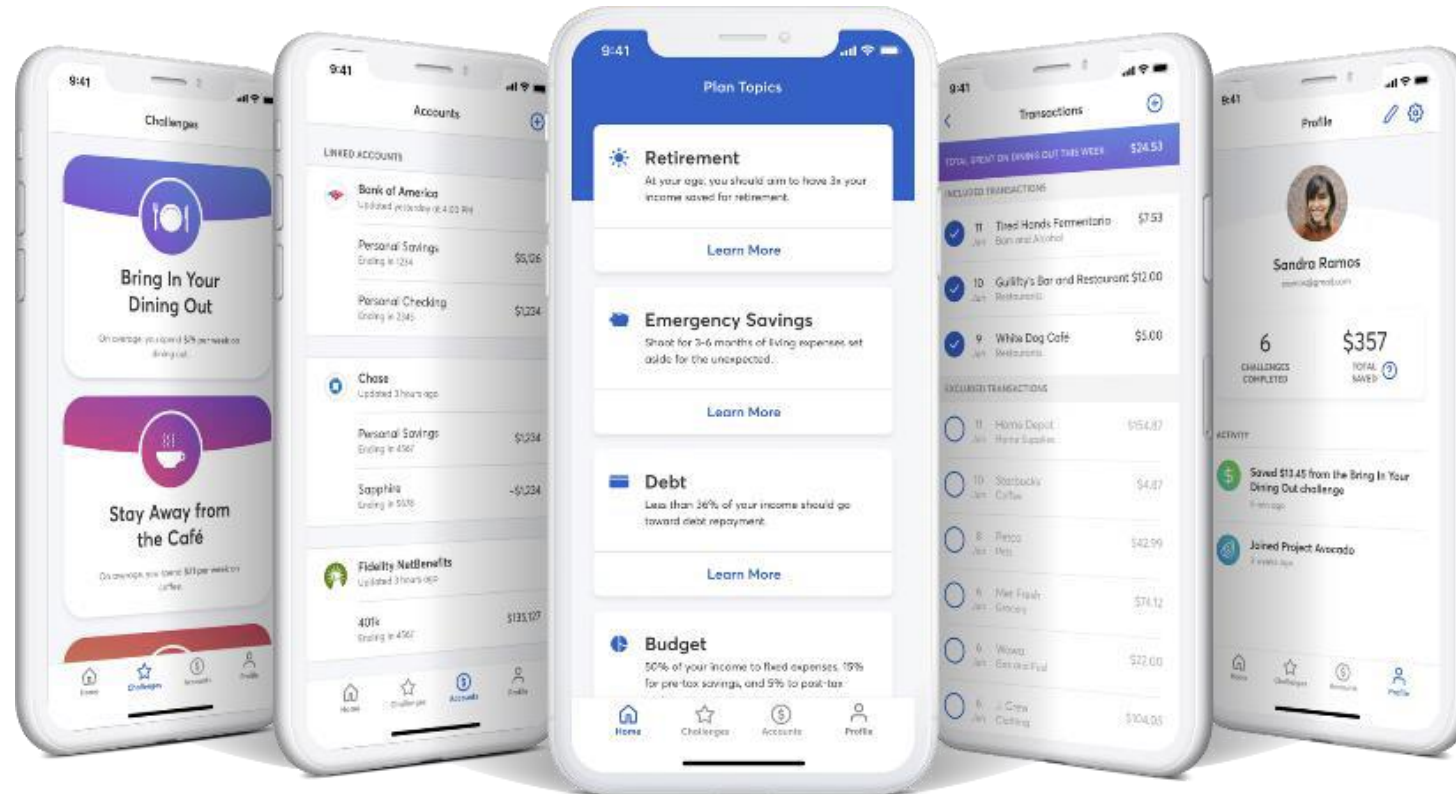
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- Organize all your finances in one place
- Free banking with up to 2.8% interest
- Affordable financial planning guidance
- Budgeting, spending and saving tools
- Resources, education, discount marketplace
- Bank level security and one-on-one support



# Financial Organization Platform



All your finances in  
one place.  
Start for free.



Bank level  
security.



All in one, easy  
budgeting.



Personal goals  
planner.



Track savings  
and investing.



Monitor bill  
payments.



Personalized  
advice,  
recourse.

# Banking That Works For You

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Varo Bank puts you first.  
Banking that helps.

- \$30 Cash gift for you
- Up to 2.8% high yield APY interest
- Zero fees
- No transfer fees
- No monthly fees
- No overdraft fees
- Two-day paycheck advance
- Free ATMs
- No minimum balance fees
- Free Varo Visa debit card
- \$250,000 FDIC insured



# Dedicated Subscription Planning Team

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- ✓ A new way of consulting - affordable subscription based financial planning
- ✓ Personalized plan with dedicated CFP advisor team
- ✓ Digital financial plan
- ✓ Debt repayment planning
- ✓ Retirement projections and planning
- ✓ Tax planning
- ✓ 401(k) review analysis
- Investment risk analysis
- ✓ College planning
- ✓ Insurance analysis
- ✓ Professional support team
- ✓ Regular education videos
- ✓ Free webinars
- ✓ Estate plan review
- ✓ Vault to store financial documents
- ✓ Financial coaching





# Security



Password protection



Highest encryption – 256 bit  
secure socket layer



Secured data



Routine security testing



2-factor authentication



Non-transactional



# Junior Achievement One for One



You register for subscription  
planning, we sponsor a  
JA student



Financial literacy for the  
next generation



You Invest in your Future - CBA  
Invests in Our Future

# Thank You



## CONTACT US

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