

	Response
Name of Firm	Just Wealth, LLC
Contact info:	Phuong Luong Email: phuong@justwealthplanning.com Phone: (617) 804-1032
Website URL and/or NAPFA profile URL	www.justwealthplanning.com https://www.napfa.org/firm/39422/23836
How many employees?	Solo practice
Do you have account minimums?	No account minimums
If you charge hourly fees, what is your standard rate?	Hourly fees of \$175/hour
If you charge AUM, how do you calculate fees?	No AUM
What is the range of AUM percentage fees?	N/A
What software do you use to prepare financial plans?	Right Capital
Where do you meet clients? Your office, their home, Web meeting?	Web meeting
Do you accept clients outside Massachusetts?	Yes
How long have you been a CFP® professional?	1 year
Do you specialize? (divorce, retirement, seniors LGBTQ, etc	Individuals and couples in their 20s, 30s, and 40s
Do you have any disciplinary history? Where can clients see it?	I do not have any disciplinary history.
Where is your office located?	Cambridge, MA
What is the name of your Registered Investment Advisor?	Phuong Luong
What is the name of your Broker-Dealer, if applicable?	N/A
Would you offer a free introductory call (for clients who have questions)?	Yes, please feel free to use this scheduling calendar to find a time for a free introductory call: https://justwealthplanning.as.me/strategy-session