

Core Investment Management

\$250,000 in Investable Assets

- ❖ Review Goals and Objectives
- ❖ Risk Tolerance Analysis
- ❖ Investment Policy Statement
- ❖ Net-Worth Analysis
- ❖ Cash-Flow Analysis
- ❖ Asset Allocation
- ❖ Portfolio Rebalancing
- ❖ Portfolio Performance Reporting
- ❖ Tax and Cost Basis Reporting
- ❖ Annual Portfolio Review Meeting
- ❖ Monthly Financial Newsletter
- ❖ Quarterly Market Updates & Analysis

Additional Services*

- ❖ Income Tax Preparation
- ❖ Financial Plan Development
- ❖ Retirement Income Plan Development
- ❖ Social Security Benefits Analysis

Financial Planning

\$500,000 in Investable Assets

In addition to the Core Investment Management services, Financial Planning clients receive:

- ❖ Financial Plan Development
- ❖ Semi-Annual Portfolio Review Meeting
- ❖ Retirement Needs Analysis
- ❖ Income Distribution Strategies
- ❖ Social Security Benefits Analysis
- ❖ Education Funding Strategies
- ❖ Tax Planning
- ❖ Comprehensive Insurance Planning
- ❖ Financing Strategies

Additional Services*

- ❖ Income Tax Preparation
- ❖ Financial Plan Updates

Complete Wealth Management

\$1,000,000 in Investable Assets

In addition to Core Investment Management and Financial Planning services, Complete Wealth Management clients receive:

- ❖ Annual Financial Plan Updates
- ❖ Semi-Annual Comprehensive Wealth Management Review Meeting
- ❖ Quarterly Advisor Phone Calls
- ❖ Custom Tax-Optimized Investment Solutions
- ❖ Coordination with Attorneys for Asset Registrations & Beneficiaries
- ❖ Charitable Giving Strategies
- ❖ Family Meetings
- ❖ Executive Compensation (Deferred Compensation, Stock Options, Concentrated Equity Positions)

Additional Services*

- ❖ Income Tax Preparation

* Additional services available for an hourly consulting or fixed fee.*

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