



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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