Customized Services Packages

At Level Paths, we offer financial planning and investment management services, and the majority of our clients utilize both.

The **Investment Management Services** are fairly uniform, because we provide discretionary management and systematic reporting. Over the years we have learned that our clients prefer a comprehensive Annual Meeting and *Progress Report* along with access to supplemental materials like our semi-annual *Investment Commentary* and Raymond James research through www.levelpaths.net. This is our standard of service for all our clients and is inclusive in their investment management fee.

Our clients' financial planning needs, however, are more unique. Every client receives an initial planning service and fee appropriate to their situation. **Yet most of our clients need ongoing planning services, so we offer 4 retainer Financial Planning Service Packages**. All packages are *guidelines* for client service levels and can be modified according to the specific needs of the client. Each level corresponds to the number of planning meetings needed for the calendar year and is reflective of the complexity of each clients' situation.

Level 1:
Typically for clients with a Net Worth over $150,000, this level includes the annual planning meeting for updating our 24/7 planning tool and the client's Personal Finance Progress Report. (Estate Planning and Insurance is reviewed every 3 years). Additional services include a comprehensive Financial Statement, coordination of strategies with their legal and tax professionals, and access to the Level Paths' educational materials. ($500 minimum annual retainer fee)

Level 2:
Typically for clients with a Net Worth over $500,000, this level includes 2 semi-annual planning meetings; one for updating our 24/7 planning tool and the Personal Finance Progress Report, and another for the Estate Planning and Insurance Progress Reports. Additional services include a comprehensive Financial Statement, coordination of strategies with their legal and tax professionals, access to the Level Paths' educational materials, comprehensive Data Aggregation across all financial accounts, and a Level Paths Survivor Binder. ($1,000 minimum annual retainer fee)

Level 3:
Typically for clients with a Net Worth over $1,000,000, this level includes 3 planning meetings through the year, one for updating our 24/7 planning tool and the Personal Finance Progress Report, another for the Estate Planning and Insurance Progress Reports, and a third for the Strategic Giving meeting. Additional services include a comprehensive Financial Statement, coordination of strategies with their legal and tax professionals, access to the Level Paths' educational materials, comprehensive Data Aggregation across all financial accounts, and a Level Paths Survivor Binder. ($1,500 minimum annual retainer fee)

Level 4:
Typically for clients with a Net Worth over $1,500,000, this level includes the Level 3 planning meetings throughout the year, *and* the custom *Financial Retreat* meeting (which includes your legal and tax professionals and your Next Generation participation). Level 3 meetings: one for updating our 24/7 planning tool and the Personal Finance Progress Report, another for the Estate Planning and Insurance Progress, and a third for the Strategic Giving meeting. Additional services include a comprehensive Financial Statement, coordination of strategies with their legal and tax professionals, access to the Level Paths' educational materials, comprehensive Data Aggregation across all financial accounts, and a Level Paths Survivor Binder. ($2,000 minimum annual retainer fee)