



# SERVICE OFFERINGS



Educating and guiding dentists  
through life's financial journey

Listen. Learn. Invest. 



# SERVICES AND FEE SCHEDULE

## EARLY CAREER

### Core Planning\*

\$200/month or \$200k AUM

- Annual Review (2-hour meeting)
- Investment Advice and Portfolio Management
- Initial Goal Funding Analysis
- Analysis and Implementation of Risk Management Strategies
- Budgeting, Savings Goals, Student Loans and Employee Benefits
- Performance Summary Reports
- Online Investor Access with Task Management Portal
- Digital Document Vault
- Educational Webinar Access
- Virtus Dental Consultant Network Access
- Annual Client Symposium Invitation

## MID CAREER

### Foundational Planning\*

\$375/month or \$500k AUM

- Core Planning Services
- Annual Review (2-hour meeting) and Semi-Annual check-in if needed
- Financial Goal Planning and Implementation via eMoney Advisor
- Retirement Needs/Gap Analysis
- Educational Funding Analysis and Strategies
- Account Aggregation and Reporting
- Limited Tax Loss Harvesting
- Income Distribution Strategies
- Beneficiary Review

## ESTABLISHED CAREER

### Comprehensive Planning\*

\$500/month or \$1m AUM

- Core and Foundational Planning Services
- Annual Review (2-hour meeting) and Quarterly Check-in if Needed
- Collaboration with CPA
- Tax Planning
- Comprehensive Tax Loss Harvesting Strategies
- Collaboration with Attorney
- Estate Planning
- Wealth Transfer Planning
- Business Succession Planning
- Charitable Planning Education and Strategies

\*Clients who choose to self-direct their investments would be subject to the appropriate monthly fee schedule. Clients my subscribe to a higher service model if under AUM minimum.

## Our Team

### Our Difference | Our Ethos

Our goal is for our clients to receive more service from us than we receive in the form of revenue from them.

Service is a core value at Virtus Financial Partners... it's our oath to you.

We invite you to come experience Our Difference.

Virtus Financial Partners strives to provide our clients with the highest standard of service. We strive to provide you with whatever education you need to empower you to make confident decisions. Those decisions are built on trust.



Scan the QR code to schedule your consultation.  
407-267-8445 | [virtusfinancialpartners.com](https://virtusfinancialpartners.com)

## Business & Hourly Services

### Business Planning

- Corporate Benefits and Retirement Plan Consulting
- Executive and Key Person Recruitment/Retention
- Dental Practice Start-Up/Acquisition Consulting
- Key Person Financial Planning Services
- Annual 401k Education
- 401k Due Diligence Study for Compliance Review
- Solo 401k For Independent Contractors
- Defined Benefit Plan Study and Management

### Available through Virtus Dental Consultant Network

- Practice Valuation for Transaction
- Practice Financing
- Malpractice Insurance
- Real-Estate Brokerage
- Business Owner Liability Insurance
- Health Insurance for Individuals and Small Businesses
- Tax Preparation and Planning
- Practice Brokerage
- Business Owner Legal Counsel

### Hourly Services

\$250 per hour

- Due Diligence on Self-Directed Investment Accounts
- Student Loan Consulting and Debt Repayment Strategies
- Asset Allocation Planning for Self-Directed Investment Accounts
- One-Time Retirement Gap Analysis
- Alternative Investments Due Diligence
- Insurance Review and Recommendations
- Budget Review and Personal Finance Coaching
- Financial Management Technology setup and Training