



Eric L Ross Sr, MBA

Since 2004, I have been providing financial advice and assistance to individuals and small businesses in the greater Los Angeles area. Prior to starting my independent practice, Eric was an Financial Advisor for a large Wall Street Investment Firm in Long Beach, CA.

As a Financial Advisor, and an Investment Advisor Representative with Crown Capital Securities, I hold series 24,7,63 and 66 securities registrations and am registered to conduct business in California. In addition I hold California Life and Long Term Care Insurance licenses.



Financial Planning

Wealth Management

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Securities offered through Crown Capital Securities,
L.P., member FINRA/SIPC.

Ross Wealth Management Planning Services Packages

*Also available is custom planning, which is subject to individual pricing, terms and conditions are negotiated.

Premier

- Financial Needs Analysis
- Risk Assessment
- Investment Recommendations
- Annual Review
- Quarterly Phone Call
- Quarterly Newsletter
- Online access to view accounts

One Time Fee of \$250.00

Accumulator

- * All services listed in **Premier**
 - Financial Plan to include:
 1. Retirement Planning
 2. Education Planning
 3. Cash Flow Planning
 4. Tax Planning
 5. Investment Planning
 6. Risk Management
 7. Estate Planning
 - Quarterly Economic Update
 - Online access to view accounts
 - Biannual meetings

Initial Fee: \$1500.00

Recurring Annual Fee \$500.00

Legacy

- * All services listed in **Premier** and **Accumulator**
 - Advance Estate Planning **
 - Philanthropic Planning
 - Asset Protection Planning
 - Quarterly Meetings
 - Monthly Phone Call
 - Annual Meeting with your CPA and Estate Planning Attorney
 - Access to concierge services
 - Online access to view accounts

**Legal services not provided by Ross Wealth Management or Crown Capital Securities.

Initial Fee: \$2000.00

Recurring Annual Fee: \$1000.00