



Your Life.Your Goals.Our Focus.



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Silver Key Service Core Investment Management

- Discovery process
- Custom analysis of risk tolerance
- Investment management agreement
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting
- Education planning and funding
- Financial plan development

Gold Key Service Financial Planning

- Comprehensive financial plan
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding
- Tax planning
- Comprehensive insurance planning
- Estate planning services
- Consolidated online account access
- Secure e-document organizer vault
- Discovery process
- Custom analysis of risk tolerance
- Investment management agreement
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting
- Education planning and funding
- Financial plan development

Platinum Key Service Comprehensive Wealth Management

- Strategic planning for wealth conservation
- Charitable gifting strategies
- Trust creation and asset integration
- Tax-Advantage Planning
- Executive compensation planning for:
 - Deferred compensation
 - Stock options
 - Concentrated portfolios
- Business financial planning
- Annual financial plan updates
- Comprehensive financial plan
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding
- Tax planning
- Comprehensive insurance planning
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Securities and advisory services offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.

Asset allocation does not ensure a profit or protect against a loss. Rebalancing a portfolio may cause investors to incur tax liabilities and/or transaction costs and does not assure a profit or protect against a loss.