Benefits	$500,000 or less	500,000 - <$1,000,000	$1,000,000 -$2,000,000	Over $2,000,000
Semi-Annual Strategy Meetings (Face-to-Face or GoToMeeting)	✓	✓	✓	✓
Risk Assessment	✓	✓	✓	✓
Investment Model Asset Management Aligned to Your Personal Risk Level	✓	✓	✓	✓
Contribution and Withdrawal Reports	✓	✓	✓	✓
Projected Cash Flow Reporting	✓	✓	✓	✓
Portfolio Reporting	✓	✓	✓	✓
IRA Required Minimum Distribution (RMD) Planning	✓	✓	✓	✓
Beneficiary Reviews	✓	✓	✓	✓
Weekly Market Updates	✓	✓	✓	✓
Quarterly Newsletter	✓	✓	✓	✓
Goal Planning and Monitoring		✓	✓	✓
Digital Document Organizer/Storage		✓	✓	✓
Capital Gains Tax Planning		✓	✓	✓
Securities Class Action Paperwork Assistance		✓	✓	✓
Retirement Income Plan		✓	✓	✓
Education Funding Strategies		✓	✓	✓
Disability/Long-Term Care Planning		✓	✓	✓
Investment Loss Harvesting		✓	✓	✓
Annual Retirement Account Fees Waived		✓	✓	✓
Banking Fees Waived		✓	✓	✓
Employer Retirement Plan Review			✓	✓
Optional Comprehensive Financial Plan			✓	✓
Customized Estate Planning			✓	✓
ProtectMyID Free Membership			✓	✓
Subscription to Kiplinger's Personal Finance			✓	✓
Invitation Only Events			✓	✓
Quarterly Performance Reports			✓	✓
Option for Account Aggregation Reporting			✓	✓
Work with CPA to Provide End of Year Tax Documents			✓	✓
Financial Life Organizer (Binder and/or Electronic)			✓	✓
Philanthropic/Gifting Planning Strategies				✓
Annual Meeting with Family and Other Advisors				✓
529 Plan Guidance				✓
Access to Alternative Investments				✓
Introduction to Private Money Managers				✓
Provide Technical, Fundamental, and Quantitive Investment Analysis				✓

This is an example of the benefits available; some client may experience more or less depending on their individual needs

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