CLIENT SERVICES MENU

"The New Standard in Personalized Wealth Management"

Investment Oversight Service

- Analyzing your investments and designing a personalized portfolio appropriate to your needs
- Review of your portfolio's positioning to ensure *meaningful diversification* to address common possible portfolio flaws
- Continual, year-long, continual monitoring of your investments and investment managers
- Quarterly, semi-annual or annual meetings to: review and evaluate your investment performance in relationship to your goals, update your overall financial objectives and if necessary, reallocate your portfolio as agreed upon by you
- Quarterly "market watch" letter detailing our firm's research, analysis and view of the current state of the investment markets

Tax Reduction Planning

- Comprehensive review of your tax position to assess opportunities for maximizing tax reduction strategies that include analysis of Roth conversion possibilities, the matching of Passive income with Passive Loss activities
- Annual review of your tax situation and planning to incorporate any new tax law changes
- Keeping you up-to-date on new tax laws that can affect your situation
- Provide guidance on Tax Free Exchange possibilities
- Recommendations of tax solutions including tax advantaged investments – some that even can reduce the taxation on Minimum Required Distributions from retirement accounts

Family Wealth Planning

- Analysis of your current Estate Plan and concerns
- Assistance in transferring assets to your Living Trust or other trusts
- Beneficiary Designation review and audit

Insurance Planning

- Review of your insurances: life insurance, disability income replacement insurance, long term care insurance and annuities

Client Services & Communications

- Quarterly, Newsletter to keep you apprised of the most current planning options
- Quarterly, semi-annual or annual reviews (dependent upon client preference and situation mandates)
- Special reports on how to help reduce your taxes and other important topics
- Special Events, including Client Appreciation Events (exclusive to you and up to 2 guests)
- Sessions with expert speakers on topics such as Social Security, Identity Theft, Asset Protection
- Annual philanthropic volunteer opportunities

Collaborative Services

- Resource to many allied subject matter experts: accountants, bankers, trust officers, attorneys, real estate professionals, P&C advisors, individual and group healthcare/medical insurance advisors, valuation experts and philanthropic organizations, corporate expense reduction analyses, retirement plan specialists, asset protection experts and captive insurance carrier experts

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