

Service Platform

Tiered Services
That Excel Our
Clients Success

Core Investment Management | \$250,000 in Investable Assets

- Annual Review Meetings with your advisor, either in-office, video conference or by phone.
- Client emails to administrator, advisor-answered within 3 business days.
- Portfolio Investment Management:
 - Goals and objectives review
 - Custom analysis of risk tolerance
 - Asset allocation and rebalancing review
 - Tax and cost-basis reporting
 - Quarterly portfolio performance reporting
 - Required Minimum Distribution Management
- Life and Health Insurance Review
- Online Client Portal Access
- Monthly Market and Economic Communications

Additional Services Available:

- + Project-Based or Complete Financial Plan
- + Ongoing Financial plan updates