

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 2 business days.**
- **Investment Management Review:**
 - Goals and objectives
 - Custom analysis of risk tolerance
 - Asset allocation
 - Tax and cost-basis reporting
 - Quarterly portfolio performance reporting
 - Required minimum distribution management
 - Socially Responsible/ESG investing
- **Life and health insurance review**
- **Online client login**
- **Monthly market and economic communications**

Additional Services Available: + Project based plan or Foundation Plan
+ Ongoing financial plan updates