Service Platform

Tiered Services That Excel Our Clients Success

Wealth Management | $500,000 in Investable Assets

- **Semi-Annual Review Meetings with your advisor, either in-office, video conference or by phone. Client-Requested callbacks will be returned by advisor no later than the next business day.**
- **Quarterly Client Educational and Social Events**
- **Complete Financial Plan:**
  - Retirement readiness analysis
  - Retirement income plan
  - Cash flow and budget review
  - Tax planning and review
  - Estate Planning and review
  - Net worth analysis
  - Distribution strategies
  - Goal-based planning
- **Tax-Loss Harvesting Strategy**
- **Roth Conversion Plan**
- **Personalized Portfolio/Customizable Investment**
- **Strategies**
- **Social Security Optimization Planning**
- **Stock Options and Deferred Compensation**

Service Level Includes: + All Core Investment Management Services and additional services