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**
- **Comprehensive Planning Review:**
  - Retirement readiness analysis
  - Retirement income planning
  - Cash flow and budgeting
  - Tax planning and optimization
  - Net worth analysis
  - Distribution strategies
  - Goal-based planning
  - Social Security optimization
- **Tax-loss harvesting strategy**
- **Roth conversion plan**
- **Personalized portfolio/customizable investment strategies**
- **Equity Compensation and Stock Option Review**

Service Level Includes: + All core investment management services, Additional Services and Comprehensive Plan Review