



SERVICES LIST

Bringing the joy and confidence
back to your finances

FINANCIAL PLANNING	BASIC \$250 MONTHLY	COMPREHENSIVE \$350 MONTHLY
Review Credit Scores & Credit Report / Credit Score Optimization	X	X
Personal Balance Sheet Calculation & Net Worth Statement	X	X
Basic Strategies On Managing & Paying Off Debt	X	X
Emergency Fund Calculations & Recommended Balance Optimization	X	X
Employment Benefits Review (i.e., HSA, Medical Plan Selections and etc.)	X	X
Create Comprehensive Cash Flow Based Financial Plan	X	X
Analyze & Create College Funding / College Savings Strategies	X	X
Occupation / Career Change Evaluation (Compensation & Benefits)		X
Student Loan Review; Repayment Strategies		X
Home Loan Review; Auto Loan And/Or Lease Review; Provide Recommendations		X
INVESTMENT PLANNING	BASIC \$250 MONTHLY	COMPREHENSIVE \$350 MONTHLY
Analyze & determine goals, risk tolerance, and time horizons	X	X
Review & analyze all holdings to determine alignment with current goals	X	X
Create "Living Asset Allocation" based on your cash flow needs	X	X
Reviewing current employment retirement plan investment options	X	X
Provide an asset allocation based on your financial plan	X	X
Review investment selection & allocation within Variable Annuities	X	X
Review investment selection & allocation within Variable Life Insurance	X	X
Investment Portfolio monitoring & periodic rebalancing	X	X
Implementing an individual bond strategy for fixed income investments		X
Implementing an individual stock strategy for equity investments		X
RETIREMENT PLANNING	BASIC \$250 MONTHLY	COMPREHENSIVE \$350 MONTHLY
Analyze & determine Pre-tax Contributions vs. After-tax Contributions	X	X
Creation & Implementation of Retirement Projections	X	X
Determine a Retirement Withdrawal Plan	X	X
Coordinate with Employer benefits plan Director/Administrator	X	X
Review Pension Selections and optimize withdrawal strategies	X	X
Social Security Analysis & Planning	X	X
Analyze & create Executive Compensation Award Strategies		X
Analyze & create Deferred Compensation Strategies		X
Analyze & determine Small Business Retirement Plan Selection		X
Analyze & determine Roth IRA Conversion Strategies		X
TAX PLANNING	BASIC \$250 MONTHLY	COMPREHENSIVE \$350 MONTHLY
Review two previous years of personal tax returns (Federal & State)	X	X
Analysis & Implementation of Tax Loss Harvesting Strategies		X
Coordinate with current C.P.A / Tax Professional		X
INSURANCE & RISK MANAGEMENT	BASIC \$250 MONTHLY	COMPREHENSIVE \$350 MONTHLY
Review of all existing policies to ensure adequate coverage & risk reduction	X	X
If coverage is non-existent, determine adequate coverage	X	X
Education & advisement for life, disability, and long term care insurance	X	X
Overview of existing property & casualty coverages	X	X
Overview of existing Umbrella policies; provide recommendations		X
Long-term care cash flow needs analysis		X

ESTATE PLANNING	BASIC \$250 MONTHLY	COMPREHENSIVE \$350 MONTHLY
Overview of existing Last Will & Testament; ensure current & valid	X	X
Review beneficiaries on Retirement accounts & Life Insurance policies	X	X
Overview of other existing Estate Planning documents	X	X
Overview of Asset Titling (i.e. accounts & property)	X	X
Overview of additional Estate Planning documents (i.e., Trust)		X
Creation & Review of Estate Planning Flow Chart		X
Estate Settlement Assistance; asset movement to heirs at bereavement		X
Estate Inheritance Assistance; assisting in wealth transfer		X
Coordinate with current estate planning attorney		X
PHILANTHROPIC/CHARITABLE PLANNING	BASIC \$250 MONTHLY	COMPREHENSIVE \$350 MONTHLY
Overview of current tax year gifting options & recommendations	X	X
Charitable Strategies using Required Minimum Distributions	X	X
Charitable estate planning		X
Assistance with selecting/interviewing charities & their board		X
Assistance with Donor Advised Funds, Foundations, & Supporting Organizations		X
Creating and implementing advance charitable gift planning strategies		X
TECHNOLOGY ACCESS	BASIC \$250 MONTHLY	COMPREHENSIVE \$350 MONTHLY
Access to dynamic, secure and custom account aggregation tools	X	X
Individual, secure & ample cloud storage for all important documents	X	X
Accessible via a secure internet connection – Anytime. Anywhere	X	X
Online Scheduling and Virtual Meeting availability & flexibility	X	X
Recommendations provided for additional tools to help specific client needs	X	X





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