



Client Service Packages

Kimberlee Bouska, CFP®, CRPC®

Investment Management Consultant

Financial Advisor, RJFS

503.469.7692

Advisory Services

BASIC	ENHANCED	CUSTOM
ASSETS OF \$0 – \$299,999	ASSETS OF \$300,000 – \$999,999	ASSETS OF \$1,000,000+
<ul style="list-style-type: none"> • New Client Referrals Only • Ongoing Investment Management • Retirement Evaluation • 401(k) Review • Employer Benefits Analysis • Annual Reviews 	<p>Basic Services <i>plus</i>:</p> <ul style="list-style-type: none"> • Retirement Planning • Retirement Distribution Strategy • Net Worth Analysis • Tax Strategies • Volatility and Risk Management • College Planning • Life Insurance Review • Property Insurance & Umbrella Reviews • Long-Term Care Expense Planning/Insurance • Estate Planning Analysis • Social Security Maximization Analysis • Real Estate Investment Options • Investment Analysis 	<p>Enhanced Services <i>plus</i>:</p> <ul style="list-style-type: none"> • Focus on Investments & Personal Values Alignment • Tax Efficiency Analysis • Charitable Giving & Philanthropic Goals • Gifting Strategy • Concentrated Equity Position Analysis • Survivor Needs Analysis • Multi-Generational Planning • In-Depth Cash Flow Management • Comprehensive Asset Allocation Evaluation • Meeting Your Professional Team
REVIEWS & COMMUNICATIONS		
<ul style="list-style-type: none"> • In-Person or Virtual Strategy Session every 18 months • Annual Account Review • Monthly Market Updates • Quarterly Strategy Updates • Timely Updates on Current Financial Events • 10 Minute Snapshot Calls 	<p>Basic Services <i>plus</i>:</p> <ul style="list-style-type: none"> • Ongoing Education— Important Financial & Life Issues • Annual In-Person or Virtual Strategy Session • 1-Hour Deep Dive Conversation • 10 Minute Snapshot Calls 	<p>Enhanced Services <i>plus</i>:</p> <ul style="list-style-type: none"> • Progress Reviews for Goal-Based Analysis • Roadmap Reviews to Address Past, Current & Future Planning

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ACCESS		
<ul style="list-style-type: none"> • ClearMatch • Everplans • Account Aggregation • Client Access • The Vault 	Basic Services plus: <ul style="list-style-type: none"> • EverSafe, PinnacleCare & Broadspire®—Access and Discounted Rates 	Enhanced Services plus: <ul style="list-style-type: none"> • EverSafe, PinnacleCare & Broadspire®—Access and Discounted Rates
COSTS		
Standard Schedule - Additional fee(s) for additional Financial Planning Services	Additional Discounts Beyond Standard Schedule	Additional Discounts Beyond Standard Schedule

*All services above may not be applicable to your scenario. I will tailor each set of services based upon your individual needs and situation.

Registered address: 17877 NW Evergreen Pkwy, Beaverton, OR 97006 | 503.469.7692

You should discuss any tax or legal matters with the appropriate professional. Please note, changes in tax laws may occur at any time and could have a substantial impact upon each person’s situation. While we are familiar with the tax provisions of the issues presented herein, as Financial Advisors of RJFS, we are not qualified to render advice on tax or legal matters. Financial Advisors offer securities through **Raymond James Financial Services, Inc.** Member [FINRA/SIPC](#) and securities are not insured by credit union insurance, the NCUA or any other government agency, are not deposits or obligations of the credit union, are not guaranteed by the credit union, and are subject to risks, including the possible loss of principal. First Technology Federal Credit Union and Addison Avenue Investment Services are not registered broker/dealers and are independent of Raymond James Financial Services, Inc. Investment advisory services offered through Raymond James Financial Services Advisors, Inc.

Managed accounts are charged Advisory Fees in addition to internal fees of investment company products and should be evaluated when determining the costs of a fee-based account. A list of additional considerations, as well as the fee schedule is available in the firms Form ADV (Part 2A) as well as the client agreement. Please ask your Advisor to provide.

The Investment Management Consultant title is awarded to those who complete the Raymond James Institute of Investment Management Consulting program.