Addison Avenue
investment services

Advisory Client Service Packages

Kasha McLemore, CRPC®, CFP®

Investment Management Consultant

Financial Advisor, RJFS

503.350.4511

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Advisory Services

BASIC	CUSTOM	CONCIERGE
ASSETS OF $0 – $499,999	ASSETS OF $500,000 – $999,999	ASSETS OF $1,000,000+
• 401(k) Review • Asset Allocation • Beneficiary Review • Cash Flow/Distribution Reporting • College Planning • Customized Investment Portfolio(s) • Financial Goal Plan w/Online Access • Financial Planning – Short & Long-Term • Life Insurance Review • Ongoing Investment Management • Retirement Evaluation • Social Security Maximization Analysis • Tax Strategies • Volatility and Risk Management	Basic Services *plus*: • Retirement Planning Coordination • Cash Flow & Income Strategy Planning • Education Fund Strategies • Long-Term Care Expense Planning/Insurance • Retirement Needs Analysis • Semi-Annual In-Person or Virtual Review • Survivor Needs & Longevity Planning • Tax Efficient Investment & Distribution Analysis	Custom Services *plus*: • Annual Meeting with Family and Other Advisors • Charitable Giving & Philanthropic Strategies • Concierge Service for Outside Resources • Educational Planning • Gifting Strategies • In-Depth Cash Flow Management • Multi-Generational Planning • Quarterly In-Person or Virtual Review • Survivor Needs Analysis

REVIEWS & COMMUNICATIONS

All packages include:

- Annual In-Person or Virtual Review
- Ongoing Education—Important Financial & Life Issues
- Performance Summary Reports
- Quarterly Newsletters

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ADVISORY CLIENT SERVICE PACKAGES

BASIC	CUSTOM	CONCIERGE
ASSETS OF $0 – $499,999	ASSETS OF $500,000 – $999,999	ASSETS OF $1,000,000+

ACCESS

All packages include:

- EverSafe, PinnacleCare & Broadspire®—Access and Discounted Rates
- ClearMatch
- Everplans
- Account Aggregation
- Client Access
- The Vault

COSTS

BASIC	CUSTOM	CONCIERGE
Standard Schedule	Additional Discounts Beyond Standard Schedule	Additional Discounts Beyond Standard Schedule

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

Registered address: 2929 SW Cedar Hills Blvd., Bldg. 19, Beaverton, OR 97005 | 503.469.7692

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