



Client Service Platform

Platinum Service

"It takes 20 years to build a reputation and five minutes to ruin it. If you think about that, you'll do things differently." Warren Buffet

While it may be enough to provide you with a comprehensive, integrated financial plan we feel the need to go one step further in order to provide a truly unique experience.

Comprehensive Review with Primary FA

- ☐ Quarterly

What is covered

- Financial & Estate Plans are reviewed and updated
- All plan document, profiles and data are reviewed and updated
- Individual manager and overall investment performance are measured and compared to both the indexes and the goals of your plan
- Recommendations from attorneys, accountants or other financial providers are incorporated into your plan

Touch base call from Primary or Secondary FA

- ☐ Monthly

What is covered

- Market Update
- Suggested recommendations
- Pro-active and to touch base

New Contact Information

- ☐ US Mail _____
- ☐ E- mail: _____
- ☐ Telephone: _____

Services Offered

- ☐ Review estate plan
- ☐ Wills and Trusts
- ☐ Insurance and Annuities
- ☐ Review Beneficiaries on Accounts
- ☐ Long Term Care
- ☐ Alternative Investments
- ☐ Employee Benefits
- ☐ Investment Banking
- ☐ Comprehensive Research
- ☐ Fixed Income
- ☐ Tax Free Income
- ☐ Business Owner Exit Strategies/Succession Planning
- ☐ Hedging Concentrated positions
- ☐ Financial Planning
- ☐ Meet with attorney
- ☐ Annual 'accountant ready' tax packages
- ☐ Meet with CPA

Tools To Keep You Informed and Organized

- ☐ Monthly market update
- ☐ Client Binder

Administrative and Online Services

- ☐ Checks/Debit Cards
- ☐ Automatic Funds Transfer Services
- ☐ Direct Deposit
- ☐ Online Account Access
- ☐ Online Bill Pay
- ☐ Website Navigation Demonstration
- ☐ Paperless Statements