Addison Avenue
investment services

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+
• New Client Referrals Only • Ongoing Investment Management • Retirement Evaluation • 401(k) Review • Employer Benefits Analysis • Annual Reviews	Basic Services *plus*: • 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	Enhanced Services *plus*: • 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		
• 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	**Basic Services *plus*:** • Ongoing Education—Important Financial & Life Issues • Annual In-Person or Virtual Strategy Session • 1-Hour Deep Dive Conversation • 10 Minute Snapshot Calls	**Enhanced Services *plus*:** • Progress Reviews for Goal-Based Analysis • Roadmap Reviews to Address Past, Current & Future Planning

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ACCESS		
• ClearMatch • Everplans • Account Aggregation • Client Access • The Vault	**Basic Services *plus*:** • EverSafe, PinnacleCare & Broadspire®—Access and Discounted Rates	**Enhanced Services *plus*:** • 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

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