



# Advisory Client Service Packages

**Kasha McLemore, CRPC®, CFP®**

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**Investment Management Consultant**

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**Financial Advisor, RJFS**

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**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+
<ul style="list-style-type: none"> <li>• 401(k) Review</li> <li>• Asset Allocation</li> <li>• Beneficiary Review</li> <li>• Cash Flow/Distribution Reporting</li> <li>• College Planning</li> <li>• Customized Investment Portfolio(s)</li> <li>• Financial Goal Plan w/Online Access</li> <li>• Financial Planning – Short &amp; Long-Term</li> <li>• Life Insurance Review</li> <li>• Ongoing Investment Management</li> <li>• Retirement Evaluation</li> <li>• Social Security Maximization Analysis</li> <li>• Tax Strategies</li> <li>• Volatility and Risk Management</li> </ul>	<p><b>Basic Services <i>plus</i>:</b></p> <ul style="list-style-type: none"> <li>• Retirement Planning Coordination</li> <li>• Cash Flow &amp; Income Strategy Planning</li> <li>• Education Fund Strategies</li> <li>• Long-Term Care Expense Planning/Insurance</li> <li>• Retirement Needs Analysis</li> <li>• Semi-Annual In-Person or Virtual Review</li> <li>• Survivor Needs &amp; Longevity Planning</li> <li>• Tax Efficient Investment &amp; Distribution Analysis</li> </ul>	<p><b>Custom Services <i>plus</i>:</b></p> <ul style="list-style-type: none"> <li>• Annual Meeting with Family and Other Advisors</li> <li>• Charitable Giving &amp; Philanthropic Strategies</li> <li>• Concierge Service for Outside Resources</li> <li>• Educational Planning</li> <li>• Gifting Strategies</li> <li>• In-Depth Cash Flow Management</li> <li>• Multi-Generational Planning</li> <li>• Quarterly In-Person or Virtual Review</li> <li>• Survivor Needs Analysis</li> </ul>
<b>REVIEWS &amp; COMMUNICATIONS</b>		
<p>All packages include:</p> <ul style="list-style-type: none"> <li>• Annual In-Person or Virtual Review</li> <li>• Ongoing Education—Important Financial &amp; Life Issues</li> <li>• Performance Summary Reports</li> <li>• Quarterly Newsletters</li> </ul>		

BASIC	CUSTOM	CONCIERGE
ASSETS OF \$0 – \$499,999	ASSETS OF \$500,000 – \$999,999	ASSETS OF \$1,000,000+
<b>ACCESS</b>		
<p>All packages include:</p> <ul style="list-style-type: none"> <li>• EverSafe, PinnacleCare &amp; Broadspire®—Access and Discounted Rates</li> <li>• ClearMatch</li> <li>• Everplans</li> <li>• Account Aggregation</li> <li>• Client Access</li> <li>• The Vault</li> </ul>		
<b>COSTS</b>		
Standard Schedule	Additional Discounts Beyond Standard Schedule	Additional Discounts Beyond Standard Schedule

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

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

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.