

# Menu of Care

OVER \$1,000,000



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\$250,000 TO 1,000,000

## Financial Planning

- Retirement Needs
- Distribution Strategies
- Education Funding Strategies
- Survivor Needs
- Medicare Strategies
- Long-Term Care
- Probate Assistance
- Collaboration with other professionals
- Asset Distribution Assistance

- Net-Worth Analysis
- Cash Flow Analysis
- Goals Based Management

- Goals and Objectives
- Asset Allocation
- Portfolio Performance Reports
- Annual Review
- Financial Education
- Consultation / Advice
- Investor Guidance

## Comprehensive Wealth Management

- Conservation of Wealth
- Gifting
- Trust Integration
- Charitable Giving Strategies
- Executive Compensation
  - Deferred Compensation
  - Stock Option
  - Concentrated Equity Positions
- Business Planning
- Estate Planning

- Retirement Needs
- Distribution Strategies
- Education Funding Strategies
- Survivor Needs
- Medicare Strategies
- Long-Term Care
- Probate Assistance
- Collaboration with other professionals
- Asset Distribution Assistance

- Net-Worth Analysis
- Cash Flow Analysis
- Goals Based Management

- Goals and Objectives
- Asset Allocation
- Portfolio Performance Reports
- Annual Review
- Financial Education
- Consultation / Advice
- Investor Guidance

\$50,000 TO \$250,000

## Core Investment Management

- Net-Worth Analysis
- Cash Flow Analysis
- Goals Based Management

- Goals and Objectives
- Asset Allocation
- Portfolio Performance Reports
- Annual Phone Review
- Financial Education
- Consultation / Advice
- Investor Guidance

UP TO \$50,000

## Wealth Builder Program

- Savings Program
- Debt Management
- Goals and Objectives
- Asset Allocation
- Portfolio Performance Reports
- Annual Phone Review
- Financial Education
- Consultation / Advice
- Investor Guidance