Addison Avenue
investment services

Advisory Client Service Packages

The Downtown Bellevue Team

Bryan J. Kulp	**Adam L. Johnson, AAMS®**
Financial Advisor, RJFS	**Associate Financial Advisor, RJFS**
425.881.4109	**425.956.7165**

Advisory Services

DEVELOPER	INNOVATOR	PARTNER
ASSETS OF $100,000 – $499,999	ASSETS OF $500,000 – $999,999	ASSETS OF $1,000,000+
• Asset Allocation • Retirement Zoomer • 401(k) Review • Employer Benefits Analysis • Ongoing Investment Management • IRA Required Minimum Distribution Planning (RMD) • Education Funding Recommendations • Account Aggregation • Quarterly Market Updates	Developer Services *plus*: • Concentrated Equity Position Analysis • Planning Emphasis: – Retirement Planning – Retirement Distribution Strategy – College Planning – Tax Strategies – Life Insurance Review – Net Worth Building – Real Estate Investment Options – Social Security Maximization Analysis – Estate Planning Analysis – Volatility and Risk Management – Long-Term Care Expense Planning/Insurance – Property Insurance & Umbrella Reviews • Invitation to Annual Client Party • Strategic Portfolios • Fee Discount	Innovation Services *plus*: • Focus on Investments & Personal Values Alignment • Tax Efficiency Analysis • Charitable Giving & Philanthropic Goals • Estate Planning • Gifting Strategy • Survivor Needs Analysis • Multi-Generational Planning • Lending/Credit Solutions • Business Planning • In-Depth Cash Flow Management • Customized Investment Portfolio(s) • Comprehensive Asset Allocation Evaluation • Priority Response Time • Additional Fee Discount
REVIEWS & COMMUNICATIONS		
• Monthly Market Updates • Annual In-Person Reviews • Quarterly Strategy Updates • Monthly White Papers, Market Research & Commentary	**Developer Services *plus*:** • Bi-Annual, In-Person Reviews • Family Updates/Changes • Ongoing Education—Important Financial & Life Issues	**Modular Services *plus*:** • Quarterly, In-Person Reviews • Monthly Phone Calls • Progress Reviews for Goal-Based Analysis

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DEVELOPER	INNOVATOR	PARTNER
ASSETS OF $100,000 – $499,999	ASSETS OF $500,000 – $999,999	ASSETS OF $1,000,000+
		• Roadmap Reviews to Address Past, Current & Future Planning

ACCESS	
All packages include: • EverSafe, PinnacleCare & Broadspire®—Access and Discounted Rates • ClearMatch • Everplans	• Account Aggregation • Client Access • The Vault

COSTS		
Standard Schedule	Additional Discounts Beyond Standard Schedule	Additional Discounts Beyond Standard Schedule

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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: 500 108th Ave. NE, Ste. 1F3, Bellevue, WA 98004 | 855.744.8585

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.