



SERVICE LEVELS

COMPREHENSIVE WEALTH MANAGEMENT

- Charitable planning strategies
- Coordinate and attend meetings with Family and other advisors

- Work with CPA to provide year-end tax documents
- Assistance in reviewing Insurance strategies
- Financial Life Organizer
- Education & Gifting Strategies
- Long Term Care Planning
- Investment Policy Statement

- Comprehensive Goal Planning & Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Quarterly Reviews – Face to Face or GoToMeeting
- IRA distribution Planning
- All-inclusive account aggregation of external accounts
- Online Vault
- Newsletters and Market Insight
- Advice on 401k's

COMPREHENSIVE FINANCIAL PLANNING

- Work with CPA to provide year-end tax documents
- Assistance in reviewing Insurance strategies
- Financial Life Organizer
- Education & Gifting Strategies
- Long Term Care Planning
- Investment Policy Statement

- Comprehensive Goal Planning & Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Semi-Annual Reviews – Face to Face or GoToMeeting
- IRA distribution Planning
- All-inclusive account aggregation of external accounts
- Online Vault
- Newsletters and Market Insight
- Advice on 401k's

CORE INVESTMENT MANAGEMENT

- Basic Goal Planning & Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Annual Reviews – Face to Face or GoToMeeting
- IRA distribution Planning
- All-inclusive account aggregation of external accounts
- Online Vault
- Newsletters and Market Insight
- Advice on 401k's

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