



Taking a personal interest in your financial well-being

PREMIER WEALTH MANAGEMENT

- Quarterly Life Planning Consulting Call
- Quarterly Investment Review
- Annual Cash Flow Review
- Annual Financial Plan Review
- Investment Management
- Asset Allocation
- Portfolio Rebalancing
- Tax Planning Meeting
- Charitable Plan Review
- Family Meetings
- Annual Estate Review
- Gifting Strategies
- Retirement Distribution Strategies
- Trust Integration
- Beneficiary Review
- Tax Gain/Loss Harvesting
- Educational Opportunities
- Monthly Newsletter
- Quarterly Market Update
- Personalized Client Appreciation
- On-Line Access to Live Personalized Financial Plan
- Annual Birthday Lunch

ASSET MANAGEMENT FEE TIER STRUCTURE

\$1,000,000	1.10%
\$1,500,000	1.00%
\$2,000,000	.90%
\$3,500,000 +	.70%

EXECUTIVE WEALTH MANAGEMENT

- Semi-Annual Life Planning Consulting Call
- Semi-annual Investment Review
- Annual Cash Flow Review
- Bi-annual Goal and Objectives Review
- Investment Management
- Asset Allocation
- Portfolio Rebalancing
- Retirement Distribution Strategies
- Beneficiary Review
- Tax Gain/Loss Harvesting
- Educational Opportunities
- Monthly Newsletter
- Quarterly Market Update
- Personalized Client Appreciation
- On-Line Access to Live Personalized Financial Plan
- Annual Birthday Lunch

ASSET MANAGEMENT FEE TIER STRUCTURE

\$500,000 - \$999,999	1.25%
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WEALTH BUILDER SERVICES

- Annual Investment Review
- Annual Financial Satisfaction and Life Transaction Review
- Annual Goals Review
- Investment Management
- Asset Allocation
- Monthly News Letter
- Quarterly Market Update

ASSET MANAGEMENT FEE TIER STRUCTURE

\$250,000 - \$499,999	1.45%
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