133 E Waddil Street Marksville, LA 71351
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Menu of Services

Tax-Focused Financial Planning and Investment Management

Fee Based Financial Planning

Packages	Individual *for Pre-Retirees and Retirees*	Business *for Business Owners*
Initial Complimentary Phone Consultation	1	1
Meetings Per Year (In-Person or Virtual)	4	4
Phone Calls and Emails	Unlimited	Unlimited
Monthly Subscription Fee	$225	$300
Resources		
AdviceWorks Client Portal	●	●
Online Education Suite	●	●
Goal Planning	●	●
All In One Place Account Linking	●	●
Secure Document Vault	●	●
Budgeting and Expense Tracking	●	●
Monthly and Quarterly Newsletters	●	●
Educational Workshop Invitations	●	●
Personal Planning Areas		
Portfolio Analysis	●	●
Employee Benefits Review	●	●
Qualified Plan Asset Allocation Review	●	●
Insurance Needs Analysis- Life, Disability, LTC	●	●
Debt Analysis and Reduction Strategies	●	●
Retirement Analysis/Plan	●	●
College Funding Analysis/Plan	●	●
Tax Planning	●	●
Estate Planning (with your Attorney)	●	●
Retirement Income Plan (ATS Strategy)	●	●
Pension Maximization Strategies	●	●
Required Minimum Distribution (RMD) Planning	●	●
Social Security/Medicare Planning	●	●
Legacy Planning	●	●
Business Entity Selection		●
Risk Management and Liability Protection		●
Qualified Retirement Plan Selection, Coordination, Implementation, and Monitoring		●
After-Tax Retirement Saving Strategies		●

Notes:
1. One year initial commitment. Annual monthly maintenance fee of 50% thereafter. Cancel anytime after the first year.
2. Additional meetings may be needed.
3. Additional tax preparation fees may apply..

Asset Management

Assets Under Management Fee Schedule	
Account value of $150,000 and up	1.50%

Notes:
1. Annual investment advisory fees are billed quarterly and based on the account value at the end of each quarter.
2. The fee is comprised of the advisor fee, program fee, trading, rebalancing, ticket charges, technology costs, and more. The fee also includes a comprehensive goals-based financial plan for assets under management greater than $150,000.