Ask Rafi
Retirement Lifestyle Solutions

CLIENT SERVICES

We provide our individual clients *"Comprehensive Financial Planning and Portfolio Management Services".* We also provide benefit services to out business clients. As an independent financial services firm, we are focused on your best interest above all else. We are not tied to any specific product or investment.

SERVICES	Bronze < $100K	Silver $100K to $250K	Gold $250K to $500K	Platinum >$500K
Financial Planning Services Goals Setting*Budget*Cash Flow*Net Worth*College Savings*Emergency Savings*Insurance*Wealth Accumulation*Retirement Income*Social Security*Health Care*Long-Term Care*Legacy*	●	●	●	Included
Portfolio Management Services Investment Policy Statement*Asset Allocation and Diversification*Investment Research and Selection*Portfolio Rebalancing Active portfolio management using mutual funds, ETFs, UITs, and/or individual securities	√	√	√	√
Periodic Strategy Reviews	Annual	Semi-Annual	Quarterly	Quarterly
Market Updates	√	√	√	√
Invite to Selected Client Events/Webinars	√	√	√	√
American Lifestyle Magazine		√	√	√

ADDITIONAL SERVICES FOR BUSINESSES
Simple IRAs, SEP IRAs, 401K, Profit Sharing Plans, Health Care Plans, Life Insurance

COMPENSATION & FEES

- Financial Plan Consultation/Update: $150/hour (not to exceed $1500 per year)

Insurance Products: commissions based paid by carrier

Assets Under Management in Advisory Accounts:

Up to $250K	1.50%
$250K to $500K	1.35%
$500K to $750K	1.30%
$750K to $1M	1.25%
$1M to $2M	1.20%
Above $2M	1.15%

Non-Advisory Accounts: paid by commissions

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