

20 Tower Lane - Suite 210 -
Avon, CT 06001

Client Services



Client Level	Platinum		Gold		Silver		Bronze	
Client Meetings	In Person	Zoom	In Person	Zoom	In Person	Zoom	In Person	Zoom
Quarterly Review Meetings	1	3	1	3	1	1		
Semi-Annual Review Meetings								
Annual Review Meeting								1
Service Response Times	within: Same Day		Same Day		Next Morning		Next Day	
Wealth Planning Services								
Financial Planning: Goal Setting, Planning, and Reviews	Comprehensive	✓	✓	✓	Additional Fee (discounted)		Services Provided by Monthly Fee	
Financial Planning: Goal Setting, Planning, and Reviews	Basic: Asset-Map	✓	✓	✓	✓			
Tax Planning	✓	✓	✓	Additional Fee (discounted)				
Fit To Retire Readiness RoadMap (Certified Fit to Retire Coach)	✓	✓	✓	✓				
Retirement Income Planning, including time segmentation analysis and Social Security Analysis	✓	✓	✓	Additional Fee (discounted)				
Educational Planning	✓	✓	✓	Additional Fee (discounted)				
Medicare Planning	✓	✓	✓	Additional Fee (discounted)				
Income Tax Preparation	✓	✓	✓	Additional Fee (discounted)				
Insurance Planning and Review	Annual	✓	Annual	Upon Life Changes				
Family Financial Education and Legacy Planning	✓	✓	✓	Available				
Estate Planning	✓	✓	Additional Fee (discounted)					
Investment Management Services								
Comprehensive Investment Strategy	✓	✓	✓					
Risk Tolerance Evaluations	Annually	Annually	Annually	Biannual	As Needed			
Investment Review	Quarterly	Quarterly	Quarterly	Semi-Annual	Annual			
Asset Allocation Analysis	✓	✓	✓	✓	✓			
Outside 401k, 403b, or other Company Retirement Analysis	SemiAnnual	Annual	Annual	Annual	Annual			
Technology & Reporting								
Document Management System	Premium	Premium	Premium	Basic				
Consolidated Online Account and Performance Reporting	✓	✓	✓	✓			✓	
Mobile App for Account Access	✓	✓	✓	✓			✓	
Online Financial Plan Access	✓	✓	✓	✓			✓	
Firm Communication								
Lifestyle Print Magazine - (BiMonthly)	✓	✓	✓	✓				
Lifestyle E-Magazine (monthly)	✓	✓	✓	✓			✓	
Quarterly E-mail Newsletter	✓	✓	✓	✓			✓	
Monthly Market Update - Email	✓	✓	✓	✓			✓	
Monthly Financial Planning Video - Email	✓	✓	✓	✓			✓	
Client Survey (Every Other Year)	✓	✓	✓	✓				
Activities & Events								
Carefull Identity Protection	✓	✓	✓	✓			✓	
Annual Turkey Raffle	✓	✓	✓	✓				
Monthly Raffle	✓	✓	✓	✓				
Client Event Invitation Priority	1	1	1	2			3	

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