



*We help nurture  
our client's success*

### CORE INVESTMENT MANAGEMENT

(Only available to current clients under \$500,000 minimum)

- Meet once per year over phone, online or in office
- Goals and objectives review
- Custom analysis of risk tolerance
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

#### *Additional Services\**

- Financial plan development
- Financial plan updates

Diane Woodward is a registered representative with, and securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Strategic Wealth Advisors Group, LLC, a registered investment advisor. Strategic Wealth Advisors Group, LLC, and Oak Tree Wealth Management, LLC, are separate entities from LPL Financial.

### FINANCIAL PLANNING & INVESTMENT ADVISORY \$500,000 in Investable Assets

- Annual financial plan updates
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding
- Tax planning
- Comprehensive insurance planning
- Estate planning services
- Consolidated online account access
- Coordination with CPA and attorney

- Meet 2 times per year over phone, online or in office – ad hoc meetings as needed
- Goals and objectives review
- Custom analysis of risk tolerance
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

### COMPREHENSIVE WEALTH MANAGEMENT

\$1,000,000 in Investable Assets

- Strategic planning for wealth conservation
- Charitable gifting strategies
- Asset titling reviews
- Beneficiary reviews
- Tax-optimized investing and giving
- Executive compensation planning for:
  - Deferred compensation
  - Stock options
  - Concentrated portfolios

- Annual financial plan updates
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding
- Tax planning
- Comprehensive insurance planning
- Estate planning services
- Consolidated online account access
- Coordination with CPA and attorney

- Meet 4 times per year over phone, online or in office – ad hoc meetings as needed
- Goals and objectives review
- Custom analysis of risk tolerance
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

*Additional Services\** - Financial plan development