



*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
- 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
- Financial plan updates

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

Diane Woodward, CFP®, RICP® is a registered representative with and securities, financial planning, and advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC.

Additional Services* - Financial plan development