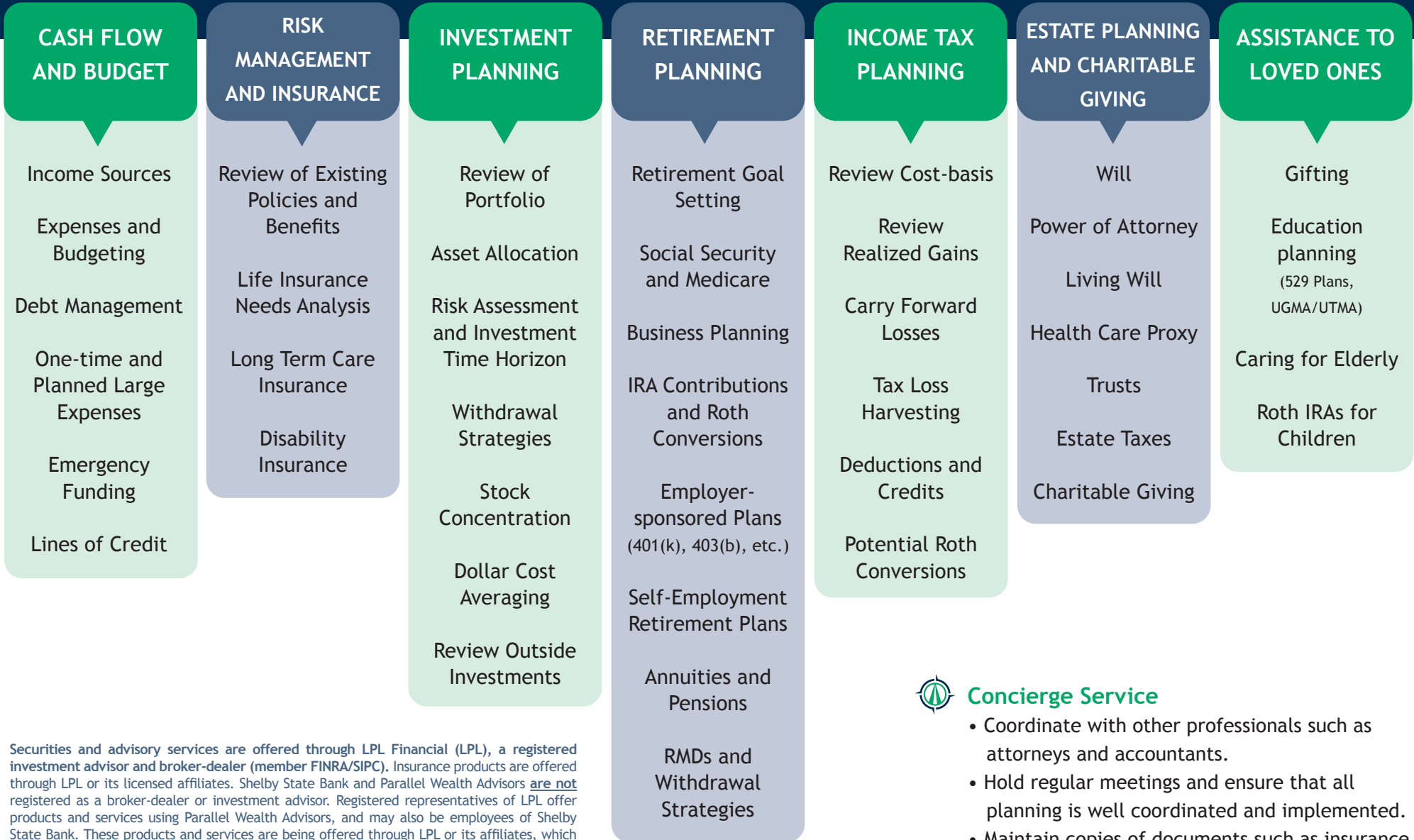


WHAT DOES YOUR FINANCIAL ADVISOR DO?



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Concierge Service

- Coordinate with other professionals such as attorneys and accountants.
- Hold regular meetings and ensure that all planning is well coordinated and implemented.
- Maintain copies of documents such as insurance policies, estate planning and legal documents and tax returns.