

Individuals & Households Service Menu

	PREMIER	COMPREHENSIVE	CORE PLUS	CORE	AUTO SAVER
	\$5 million+	\$2-5 million	\$1-2 million	\$500k-1million	
Accounts / Portfolios					
Account Establishment: (IRA, Roth, SEP IRA, Individual, Joint, Trusts, Transfer on Death, Beneficiary IRA, Charitable)	✓	✓	✓	✓	✓
Basic Investment Asset Allocation				✓	✓
Comprehensive Global Asset Allocation	✓	✓	✓		
Customized Portfolios with Individual Security Holdings and Access to Personal Portfolio Manager	✓				
Investment Management Services	✓	✓	✓	✓	
Planning					
Initial Risk Assessment	✓	✓	✓	✓	✓
Online Account Aggregation	✓	✓	✓	✓	
Securities Based Line of Credit	✓				
Basic Financial Plan	included with Comprehensive plan (below)	included with Comprehensive plan (below)	✓	\$1,000	\$1,600
Comprehensive Financial Plan	✓ (\$2-3k value)	✓ (\$2-3k value)	\$1,000	\$1,500	\$2-3,000
Comp Negotiations Coaching / Benefits Review	✓	✓	✓		
RSU/Stock Option Planning	✓	✓	✓		
Income Distribution Analysis <i>(examine income needs and spending trends to ensure your income/spending are properly aligned)</i>	✓	✓			
Real Estate Investing Advice/Analysis	✓	✓			
College Savings Planning	✓	✓			
Cost Basis Analysis	✓				
Roth Conversions Analysis/Strategies	✓	✓			
Advice/Analysis on Assets held at another institution	✓	✓			
Concentrated Stock Position Strategies	✓	✓			
Review / Monitor					
Offered Meetings per year	4	3	2	2	1
Online Account Performance and Access	✓	✓	✓	✓	✓
Albridge Wealth Report	✓	✓	✓	✓	
Portfolio Rebalancing & Review	✓	✓	✓	✓	
Financial Plan Review	✓	✓			
Tax Harvesting	✓	✓			
Year end Tax Planning with a tax professional	✓				
Education / Collaboration / Communication					
Newsletter & Economic/Market Overview	✓	✓	✓	✓	✓
Access to Firm Strategic Partners	✓	✓	✓		

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