



# Your Life. Your Goals. Our Focus.



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## Silver Key Service Core Investment Management

- Discovery process
- Custom analysis of risk tolerance
- Investment management agreement
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting
- Education planning and funding
- Financial plan development

## Gold Key Service Financial Planning

- Comprehensive financial plan
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding
- Tax planning
- Comprehensive insurance planning
- Estate planning services
- Consolidated online account access
- Secure e-document organizer vault
- Discovery process
- Custom analysis of risk tolerance
- Investment management agreement
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting
- Education planning and funding
- Financial plan development

## Platinum Key Service Comprehensive Wealth Management

- Strategic planning for wealth conservation
- Charitable gifting strategies
- Trust creation and asset integration
- Tax-optimized investing and giving
- Executive compensation planning for:
  - Deferred compensation
  - Stock options
  - Concentrated portfolios
- Business financial planning
- Annual financial plan updates
- Comprehensive financial plan
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding
- Tax planning
- Comprehensive insurance planning
- Estate planning services
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