
Menu of Services

Retirement Planning

Traditional IRA, Roth IRA, SIMPLE IRA, SEP IRA
Retirement Needs Analysis
Employer Plan Education [401(k), 403(b), 457, etc.]
Employee Stock Option Plan Education (ESOP)
Restricted Stock Units (RSU) Analysis
Non-Qualified Stock Options (NQSO) Analysis
Incentive Stock Options (ISO) Analysis
Annuities
Social Security Planning
Required Minimum Distribution (RMD) Planning
Pension Review

Insurance

Life Insurance
Disability Insurance
Long-Term Care
Property & Casualty Review
Health Insurance Review
HSA Education
Umbrella Insurance Review
Medicare Planning
Buy-Sell Agreement Review

Saving for College

529 College Savings Plans
Custodial IRAs
Uniform Transfer to Minors (UTMA) Accounts
FAFSA Education

Cash Management

Checking Accounts**
Savings Accounts**
Advisory Services
Budgeting Education
Planning for the Unexpected
Debt Management Strategies
Planning for Major Purchases

Investment Management

Full Discretionary Portfolio Management
Rebalancing Strategies
Active & Passive Strategies
Alternative Investments
Performance Reporting
Asset Allocation Strategies
Asset Location Strategies
Risk Tolerance Assessment
Online Account Access
Advanced Portfolio Analytics Reports

Tax Planning*

Income Tax Planning
Estate Tax Planning
Gift Tax Planning
Planning Gifts to Charity
Qualified Charitable Distributions (QCD)
CPA Referrals
1031 Exchange Services
1035 Exchange Services
Roth Conversion Strategies
Backdoor Roth Strategies

Estate Planning*

Trusts
Spousal Lifetime Access Trust (SLAT) Planning
Grantor Retained Annuity Trust (GRAT) Planning
Qualified Personal Residence Trust (QPRT) Planning
Irrevocable Life Insurance Trust (ILIT) Planning
Beneficiary and Asset Titling Review
Dynasty Trusts
Bypass Trusts
Estate Attorney Referrals to Draft Legal Documents
Family Meetings for Wealth Transfer Planning
Trustee Services

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