CLIENT SERVICE MATRIX

$100,000 - $1,000,000 Basic Client

Asset Management

- Basic Outcome-Based investment Planning and Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Quarterly Check-in phone calls
- Annual Reviews In-Person
- IRA distribution planning
- Newsletters and Market Insight
- Advice on outside 401(k) accounts (For additional fee)
- Online and Mobile App Access to Account
- Digital Document Organizer/Online Vault

$1,000,000 - $2,500,000 Preferred Client

Wealth Management

- Investment Policy Statement Review
- Comprehensive Goal-Based Planning and Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Monthly scheduled Check-in phone calls
- Semi, or Annual Reviews In-Person
- IRA distribution planning
- Newsletters and Market Insight
- Advice on outside 401(k) accounts
- All-inclusive account aggregation of external holdings
- Work with CPA to provide year-end tax documents
- Assistance in reviewing Insurance strategies
- Education and Gifting Strategies
- Long Term Care Planning
- Online and Mobile App Access to Account
- Digital Document Organizer/Online Vault
- Other Services Upon Request

Over $2,500,000 Private Client

Comprehensive Wealth Management

- Investment Policy Statement Review
- Comprehensive Goal - Based Planning & Monitoring
- Monthly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Monthly scheduled Check-in phone calls
- Semi, or Annual Reviews In-Person
- IRA distribution planning
- Newsletters and Market Insight
- Advice on outside 401(k) accounts
- All-inclusive account aggregation of external holdings
- Work with CPA to provide year-end tax documents
- Assistance in reviewing Insurance strategies
- Education & Gifting Strategies
- Long Term Care Planning
- Charitable planning strategies
- Coordinate and attend meetings with family and other advisors
- Online and Mobile App Access to Account
- Digital Document Organizer/Online Vault
- Other Services Upon Request