PLATINUM LEVEL CLIENT

1255 W 15th St. Suite 250 Plano, TX 75075 | (972)-379-2323

Cure FINANCIAL

Investment Planning

- Portfolio Rebalancing
- Advisor Managed Account
- Account Consolidation
- Semi-Annual Performance Report/Meeting
- RMD Calculations
- Client Aggregation/Portal Access
- Advice on held-away assets

Risk Management & Insurance Planning

- Life Insurance Need Evaluation
- Current Policy Review w/In-Force Illustrations
- Long-Term Care Need Review

Personal Finance Planning

- Debt Payoff Evaluation
- Cash-Flow Evaluation
- Net Worth Statement Preparation

Tax Strategies

- Portfolio Tax Management
- Coordination with tax professionals
- Review of Investment Tax Documents

Financial Planning

- Financial Life Planning
- Retirement Planning
- Divorce Planning
- Pre-Marriage Planning
- Incapacity Planning
- Social Security Claiming Planning

Charitable Giving

- Qualified Charitable Distributions
- Donor Advised Funds

Family Support

- Discuss Use of Minor Trusts & Special Needs Trust
- Elder Care Discussion
- Acct Titling & Beneficiary Designations
- Multi-Generational Family Meetings

Estate Planning

- Trust Review Services with Attorney
- Coordination of Goals with Attorney
- Estate Distribution Assistance

Business Planning

- Executive Compensation
- Business Succession Planning
- Retirement Plan Selection
- Assist & Evaluate Individual's Employer Sponsored Benefits

Education Planning

- Education Savings Planning
- Education Funding Strategies

Outside Professional Resources

- Attorneys
- Tax Professionals
- Senior Residence Consultant
- Charitable Giving Professional
- College Admission Coaching
- Financial Therapy
- Real Estate Agent
- Living Transition Assistance
- Health Insurance Agent
- Life Insurance Underwriter
- Mortgage Refinance Professional
- Local Charity Selection Professional