Menu of Services

Solutions Built for You

BARNUM FINANCIAL GROUP | Center for College Planning

Your Complimentary College Seminar Follow-Up Meeting

A detailed view of your current college funding and financial planning strategies

Individual Solution Design

Personalized recommendations for your specific investment and insurance needs

Risk Management

Includes:

- Insurance portfolio review & recommendations
- Life, disability, long-term care, health, auto and home insurances
- Access to over 50 different insurance companies

Client Service

- Product dependent

Compensation

- Commission-based fee dependent on product selected

Investment Management

Includes:

- Comprehensive portfolio analysis
- Tactical asset allocation
- Brokerage products
- 529 plans
- Advisory accounts

Client Service

- Review schedule dependent on assets under management

Compensation

- Quarterly fee

Financial Planning

Ongoing comprehensive plannning service tailored to you

Core Topics:

- Financial position review
- Cash flow, net worth, emergency fund
- Risk management
- Portfolio analysis (risk/return)

Goal-Based Topics:

- Retirement
- Education
- Estate and legacy
- Charitable giving
- Employee benefits
- Income tax
- Special needs planning

Client Service

- Annual plan design meeting
- Annual financial check-in
  - Additional meetings as needed for changes and life events
  - Comprehensive list of action items and recommendations
- Weekly market commentary & monthly newsletter

Coordination with Outside Professionals

- Accountants & Attorneys
- Human Resources/Benefits Departments

Annual Fee: $

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