Your Firm	Our Firm	Does Your Current Plan Stack Up?
☐	✔	Provide a structured process to listen to what is important to you, your family, your values, your challenges, and your goals.
☐	✔	Provide a comprehensive living financial analysis and plan to thoughtfully access and analyze your situation.
☐	✔	Present well-thought-out recommendations and strategies.
☐	✔	Explain your options thoroughly, implement a plan, and answer all questions.
☐	✔	Finalize strategies and investment plans, complete paperwork, position existing assets based on strategies, and schedule your first review (semi-annual, quarterly).
☐	✔	Provide an orientation to meet the team, understand your online tools, mobile app, and other resources.

Your Firm	Our Firm	Investment Planning Services
☐	✔	Provide independent advice as your financial fiduciary and personal advocate.
☐	✔	Continuously monitor your investments.
☐	✔	Hold regular meetings to review investment performance, update financial objectives, and make changes if necessary.
☐	✔	Provide recommendations regarding the positioning of funds within your employer-provided retirement plans.
☐	✔	Aggregate all of your accounts to simplify and reduce paperwork.

Your Firm	Our Firm	Tax Planning Services
☐	✔	Provide comprehensive reviews of your tax return to highlight planning opportunities, provide recommendations, and help maximize tax reduction strategies.
☐	✔	Collaborate directly with your tax and estate professionals to incorporate any new and ongoing tax law changes.
☐	✔	Offer tax-sensitive investment management, including tax-loss harvesting and capital gains management.
☐	✔	Offer free consulting with your CPA and other tax advisors.

Your Firm	Our Firm	Family Wealth Planning Services
☐	✔	Analyze your current estate plan and concerns.
☐	✔	Offer free consultations with your attorney.
☐	✔	Provide assistance in transferring assets to your Living Trust or other trusts.
☐	✔	Provide guidance on the appropriate and necessary steps in the event of the death of a loved one.
☐	✔	Review your long-term care needs.

Your Firm	Our Firm	Retirement Income & Distribution Planning Services
☐	✔	Analyze your income needs now and, in the future, to help maintain a comfortable standard of living.
☐	✔	Provide recommendations regarding an effective distribution strategy for your employer retirement plans & IRAs.
☐	✔	Analyze the beneficiaries of your IRAs and review the impact of possible Roth IRA conversion.