

GOLD LEVEL CLIENT

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



Investment Planning

- Portfolio Evaluation
- Portfolio Rebalancing
- Advisor Managed Account
- Account Consolidation
- Annual Performance Report/Meeting
- RMD Calculations
- Client Aggregation/Portal Access

Risk Management & Insurance Planning

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

Estate Planning

- Will Preparation Guidance/Review with Attorney
- Executor & Trustee Selection Discussion

Education Planning

- Education Savings Planning

Financial Planning

- Financial Life Planning
- Simplified Retirement Planning
- Social Security Claiming Planning

Family Support

- Discuss Use of Minor Trusts, Special Needs Trust
- Elder Care Discussion
- Acct Titling & Beneficiary Designations

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