



CFO Services: Dedicated to Personalized Wealth Management

We offer comprehensive financial planning and wealth management where we'll focus on your customized plan to build a solid foundation. As your financial partner, we honor fiduciary principles to act in the best interest of our clients. You can be confident that we'll select the right tools and services to help guide you to your goals.

Compare our CFO Services with the services that you are currently receiving. Our CFO Services focuses on six key areas:

Your Firm	Our Firm	Investment Management
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Independent Advice, Fiduciary Asset Management
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Value aligned investment approaches, ESG investments, and Impact Reporting
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review investments and develop a custom portfolio to meet your needs and goals
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Advice for employer plans & concentrated position analysis and strategies

Your Firm	Our Firm	Tax Planning
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of your tax return to highlight and maximize tax reduction strategies
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Recommendations of tax solutions including tax advantaged investments
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Staying up-to-date on and presenting new tax laws that can affect your situation
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Collaboration with your tax professional or referral to tax professional if needed

Your Firm	Our Firm	Life and Goal Planning
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Designing savings strategies that align with your planning goals
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Guidance for: Life changes, growing family, home purchase/sell, career changes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Guidance for: Executive and equity compensation, RSUs, stock options
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Guidance for: Education planning, charitable intentions, and Donor Advised Funds

Your Firm	Our Firm	Retirement Planning
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of income needs, guidance to fund income needs to optimize your lifestyle
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Recommendations for appropriate distribution strategies for IRAs & employer plans
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Beneficiary review and guidance
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Concentrated position analysis and strategies

Your Firm	Our Firm	Family Wealth Planning
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review current estate plan with guidance and reminders for subsequent reviews
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Strategies to efficiently transfer wealth to your loved ones in the manner you want
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Collaboration with your estate planning attorney for your best interest
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assistance in transferring assets to your trust(s)

Your Firm	Our Firm	Education & Engagement
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly client reviews first year, semi-annual, or annual thereafter
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly Economic Reports, special reports, educational & special events
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Keep you informed on current strategies, economic reports, ESG and B-Corp news



In 2022, Terra Blue Wealth Management became a B Corp™ which further solidified our commitment to purpose-driven work. B Corps are businesses that meet B-Lab's verified standards of social and environmental performance, transparency, and accountability. Visit our [website](#) to learn more.

As a Certified B-Corporation, Terra Blue Wealth Management has completed an independent assessment conducted by B-Lab and pays an annual fee to maintain the certification. Certification does not imply any specific level of skill, performance, or training in ESG investing. Commonwealth Financial Network is not a certified B-Corp and is separate and unrelated to B-Lab.

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