OAK TREE WEALTH MANAGEMENT

We help nurture our client's success

Core Investment Management

(Only available to current clients under $500,000 minimum)

- Meet once per year over the phone or online
- Goals and objectives review
- Custom analysis of risk tolerance
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

Additional Services*

- Financial plan development
- Financial plan updates

Financial Planning & Investment Advisory

$500,000 in Investable Assets

- Annual financial plan updates
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding
- Tax planning
- Comprehensive insurance planning
- Estate planning services
- Consolidated online account access
- Coordination with CPA and attorney

- Meet 2 times per year over phone or online – ad hoc meetings as needed
- Goals and objectives review
- Custom analysis of risk tolerance
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

Comprehensive Wealth Management

$1,000,000 in Investable Assets

- Strategic planning for wealth conservation
- Charitable gifting strategies
- Asset titling reviews
- Beneficiary reviews
- Tax-optimized investing and giving
- Executive compensation planning for:
  - – Deferred compensation
  - – Stock options
  - – Concentrated portfolios

- Annual financial plan updates
- Retirement needs analysis
- Income distribution strategies
- Education planning and funding
- Tax planning
- Comprehensive insurance planning
- Estate planning services
- Consolidated online account access
- Coordination with CPA and attorney

- Meet 4 times per year over phone or online – ad hoc meetings as needed
- Goals and objectives review
- Custom analysis of risk tolerance
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

Additional Services * - Financial plan development