

WEALTH MANAGEMENT

THIS ONGOING SERVICE INCLUDES:

- Blueprint to keep finances in order
- Implementation of Recommended actions from your planning package
- Referrals to professionals as needed
- Updated Plan Projections as needed
- Unlimited Up-to-date Online Access to Investment Progress
- Discretionary Investment Management
- Ongoing Client Communication and analysis of financial options
- Tax-Aware Asset Location & Tax-Loss Harvesting
- Client Education and Economic Market Commentary
- Required Minimum Distributions Tracking and Analysis
- Intelligent Rebalancing and Diversification using our rebalancing process

Invested Assets	Annual Advisory Fee
\$0 - \$500,000	1.25%
\$500,000 - \$1M	1.00%
\$1M - \$3M	0.80%
Over \$3M	0.60%

ANNUAL MINIMUM FEE OF \$2,500