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 AUM Advisory Fee
$0 - $500,000	1.25%
$500,000 - $1M	1.00%
$1M - $3M	0.80%
Over $3M	0.60%

AUM: Accounts managed at Charles Schwab & Co, Inc.

ANNUAL MINIMUM FEE OF $5,000

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