

Service Matrix



Service	Platinum	Gold	Silver
Assets Under Management	\$2 million	\$1 million	\$500,000
Model Investment Strategies	Custom	✓	✓
Ongoing Portfolio Review and Monitoring	✓	✓	✓
Beneficiary Designation Review	✓	✓	✓
Current Risk and Diversification Assessment	✓	✓	✓
Long Term Care Needs Analysis	✓	✓	✓
Life and Disability Insurance Audit	✓	✓	✓
Portfolio Stress Test	✓	✓	\$200
Comprehensive Financial Plan	✓	✓	\$200 / hr
Attend Meeting with Estate Planning Attorney	✓	✓	\$200 / hr
Existing Estate Plan Review	✓	✓	\$200 / hr
Income Tax Projections	✓	\$100 / hr	\$200 / hr
Proactive Tax Planning Strategies	✓	\$200	\$300
Social Security Taxability Analysis	✓	\$200	\$300