

Our Client Relationship Models

Financial Planning

A collaborative process that takes a holistic review of your finances to develop action plans which address any financial inefficiencies and mitigate foreseen financial risk

Foundational

For individuals and couples accumulating wealth

Core

A comprehensive approach to fully evaluate and prioritize your finances

Comprehensive

Take complete control with a team of professionals to nurture your financial legacy

Financial Areas of Focus

- Goal Setting
- Retirement Planning
- Family Wealth Planning
- Investment Planning
- Risk Management
- Estate & Charitable Planning
- Cash Flow Management
- Income Tax Planning
- Business Planning

Initial Financial Plan

First 12 Months

- Extensive Analysis of Areas of Focus
- Plan Development & Delivery
- Guided Plan Implementation
- Coordination with Plan Stakeholders

Ongoing Plan Management

12+ Months

- Continued Relationship with Financial Partner
- Maintained Financial Plan
- Annual Plan Review Meetings & Progress Reporting
- Continued Point-in-Time Advice on Areas of Focus



Investment Management

Management and monitoring of your investment account(s)

Advisory

An advisory account is a type of investment account where investment advisory services are included to help a client formulate and implement investment purchases and strategies, regularly managed and monitored.

Brokerage

A brokerage account is an investment account held at a licensed brokerage firm. An investor deposits funds into their brokerage account, and the brokerage firm transacts orders for investments such as stocks, bonds, mutual funds, and exchange-traded funds (ETFs) on their behalf.

Included Advisory Services

- Portfolio Selection
- Risk Tolerance
- Investment Research
- Rebalancing & Trading
- Annual Performance Reporting



Wealth Management

The alignment of holistic financial planning and investment management

For qualified clients, our Wealth Management Client Relationship offers continued financial planning services complementary within the overall account management fee. The account fee is based off a percentage of the account value, typically billed on a continued quarterly basis within the account(s).

- Personalized Service & Account Management
- Your Financial Thinking Partner & Coordinator
- Proactive Planning to Mitigate Inefficiencies & Risks
- Access to Specialized Team of Professionals

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Securities and investment advisory services offered through LPL Enterprise (LPLE), a Registered Investment Advisor. Member FINRA/SIPC, and an affiliate of LPL Financial.

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