

Wealth Management Advisory Services

*Signature service revolves around a 4 step process:
Assessment, Selection, Allocation, Monitoring/Review to
improve financial outcomes at retirement.*

- Serve as an ERISA 3(21) Fiduciary Adviser.
- Dividend Growth and Model Portfolios that utilize No Load Institutional Mutual Funds and/or ETFs.
- Provide a Retirement Income Summary; updated annually (Financial Profiles).
- Quarterly Fiduciary Monitoring Reports to assess the portfolio.
- Annually review the client's financial goals and outcomes, address asset allocation and income distributions as needed.

Client Communication

- Social Security: What age should I begin benefits?
- Annuities: Is that a good investment vehicle for me?
- Nearing Retirement: Prepare for the golden years!

Cover the basics on will I have enough in retirement.