

GOLD MEDAL SERVICES

The New Standard in Personalized Wealth Management



Investment Oversight Service

- Reviewing your investments and designing a personalized portfolio appropriate to your needs
- Year-long, continual monitoring of your investments
- Quarterly, semi-annual or annual meetings to review and evaluate your investment performance, update your overall financial objectives and if necessary, reallocate your portfolio as agreed upon by you
- Independent Advice
- Recommendations regarding positioning of investments within your employer provided retirement plans such as 401(k)s
- Quarterly economic report detailing updated analysis and a current view of the investment markets

Tax Reduction Planning

- Comprehensive review of your tax return to highlight opportunities for maximizing tax reduction strategies
- Annual review of your tax situation and planning to incorporate any new tax law changes
- Complimentary consultation with your tax preparer
- Recommendations of tax solutions including tax advantaged investments
- Staying current on and presenting new tax laws that can affect your situation

Retirement Income & Distribution Planning

- Analysis of your current and future income needs
- Continual development and implementation of recommendations to fund your income needs to optimize your lifestyle
- Recommendations regarding the most appropriate distribution strategy for your employer retirement plans and IRAs
- Analysis of the beneficiaries of your IRAs

Family Wealth Planning

- Analysis of your current estate plan
- Review of strategies to efficiently transfer wealth to your loved ones
- Complimentary consultation with your attorney
- Assistance in transferring assets to your Living Trust or other trusts
- Providing guidance with the appropriate and necessary steps in the event of the death of a loved one

Client Services & Communications

- Quarterly Newsletter to keep you apprised of the most current planning strategies
- Quarterly, semi-annual or annual reviews
- Special reports on how to help reduce your taxes and other important topics
- Special Gold Medal Service Events, including client appreciation events (where you may bring up to 2 guests)

Insert Approved B/D disclaimer

Neither [Broker/Dealer Name] nor its representatives provide legal or tax advice.

If legal or tax advice or other expert assistance is required, the service of a currently practicing professional should be sought.