Client Options Menu:
How We Can Work Together

Family Financial Partners
GROWING WEALTH, FOR GENERATIONS

	Details	Frequency	Cost
Financial Planning *Objective, Specific Advice as a Fiduciary Financial Planner*	**Comprehensive, in-depth analysis of some or all of the following areas:** • Investment planning and allocation • Risk management • Retirement cash flow planning • Retirement funding strategies • Social Security claiming strategies • Income tax planning* • Estate planning strategies • Life and disability insurance review • Home and auto insurance review • eMoney site overview and presentation	**Relationship-Based:** • Quarterly meetings in the first year, minimum annual meetings after with client discretion over frequency	**Fee-Based:** • Upfront, agreed upon fee for financial planning services • Annual updates
Asset Management *As a Fiduciary Investment Advisory Representative*	• Asset allocation and rebalancing • Innovative risk management • Portfolio enhancement • Tax planning strategies* • Actively managed portfolios	• Quarterly or annual reviews relevant to platform chosen and client preference	• Annual fee charged quarterly based on account size
Tailored Client Solutions	• Provide solutions to address your unique needs	• Annual review of account performance and follow up on issues related to your account	• Commissions earned on product/ investment sales

**Please seek the advice of a qualified tax advisor for your specific situation.*

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