

Defining Services, Strategies, and Solutions

\$1,000,000 and Above

Basic Needs	Asset Protection, Tax Management, Tax Free Income, Wealth Preservation, Diversification, Reasonable and Transparent Asset Management Fees, Children's Education Planning, Advanced Retirement and Insurance Planning, Personalized Estate Planning.
Planning Strategy with Possible Solutions	Customized Tax Free Portfolios, Institutional Fee Arrangements, Dividend Tax Analysis, Stock Option Planning, Separate Account Management, Managed Futures, Hedge Funds.

\$250,000 to \$1,000,000

Basic Needs	Wealth Building with Asset Protection, Diversification, Reasonable and Transparent Asset Management Fees, Tax Control, Liquidity Assurance, Children's Education Planning, Expanded Retirement and Insurance Planning, Cash Flow Analysis, Estate Review.
Planning Strategy with Possible Solutions	Globally Diversified Growth Allocation, Active Risk Management, 401(k) Review and Advice, Ongoing Cash Flow Planning, Utilization of Exchange Traded Products and Mutual Funds, Institutional Level Asset Management, Managed Futures.

\$250,000 and Below

Basic Needs	Wealth Building with Asset Protection, Diversification, Reasonable and Transparent Asset Management Fees, Children's Education Planning, Basic Retirement and Insurance Planning.
Planning Strategies with Possible Solutions	Globally Diversified Growth Allocation, Risk Management, 401(k) Review and Advice, Utilization of Exchange Traded Products and Mutual Funds, Model Portfolio Execution.