

## LIFETIME SUPPORT AND COLLABORATION

Effectively planning for your future is a marathon not a sprint. We run alongside you every step of the way. We initiate the Advanced Planning Advisory Team (estate planning lawyer, accountant, insurance advisor, banker) to facilitate the implementation and ongoing review. Through Regular Progress Meetings we review your investments and advanced plan implementation, keeping the focus on achieving your goals. Our Financial Concierge Services help you stay on top of the many financial administration issues you face.

### ADVANCED PLAN MEETING

Next, we turn to the advanced planning work with the goal of maximizing your wealth, minimizing the risks that you as a business owner face, and controlling the distribution of your assets. We convene a meeting of our professional advisor network on your behalf. Using the Business Owner Family Profile as our guide, we identify the areas that present the greatest opportunity for improvement, and proactively consider situations that could undermine your years of work.

### DEVELOP YOUR ADVISORY TEAM

Just like you have an internal advisory team of senior management to help you run your business, we work with you to assemble a personal advisory team to manage your personal financial affairs. A comprehensive management plan is only as good as its implementation. It is crucial for all of your advisors to communicate with each other and to work together on your behalf. We serve as a catalyst to make sure that happens.

### REGULAR PROGRESS MEETINGS

We begin every meeting with a review of your Business Owner Family Profile where your goals and most important relationship are front and center. Within this context, we review how your investment portfolio is progressing toward reaching your goals. We report on asset allocation and review investment managers, interpreting portfolio performance based on these factors. We discuss economic events and trends communicating their relevance to our overall plan. Finally, we address ongoing wealth enhancement, wealth protection, and wealth transfer actions steps from your Advanced Plan.

### FINANCIAL CONCIERGE SERVICES

If you have a question or concern about any financial issues, please contact us. Our goal is to make your financial life easier, and we are ready to do whatever we can to help make that possible, including:

- Collecting financial data for tax reporting
- Assisting with completion of credit applications or mortgage refinancing
- Providing bill pay and cash management services
- Completing necessary paper work surrounding the passing of a loved one