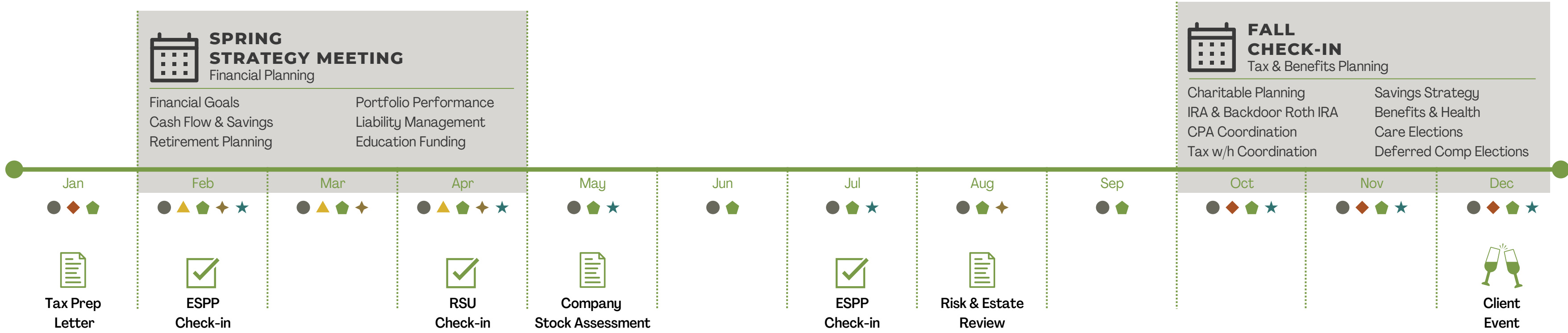


Client Service Experience

for Corporate Employees



SPRING STRATEGY MEETING

Financial Planning

Financial Goals
Cash Flow & Savings
Retirement Planning

Portfolio Performance
Liability Management
Education Funding

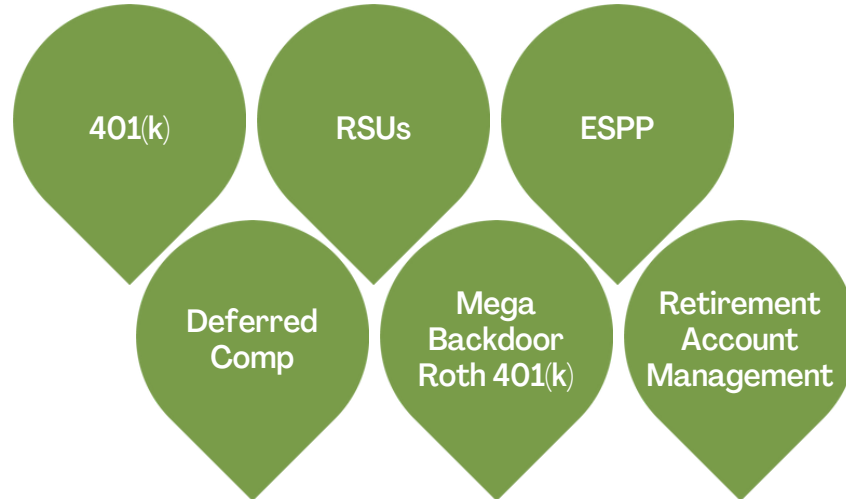
FALL CHECK-IN

Tax & Benefits Planning

Charitable Planning
IRA & Backdoor Roth IRA
CPA Coordination
Tax w/h Coordination

Savings Strategy
Benefits & Health
Care Elections
Deferred Comp Elections

Company Benefits Optimization



- LIFE EVENTS
- ▲ FINANCIAL PLANNING
- ◆ TAX PLANNING
- INVESTMENT MANAGEMENT
- ✦ RISK & ESTATE PLANNING
- ★ COMPANY BENEFITS PLANNING

Ongoing Advice



LIFE EVENTS

- Retirement Transition Planning
- Relocation Assessment
- Job Offer Assessment
- Estate Planning Objectives & Execution
- Any \$ Related Question



INVESTMENT MANAGEMENT

- Diversified
- Low Cost
- Proactive Tax Management
- Pursuing Higher Expected Returns