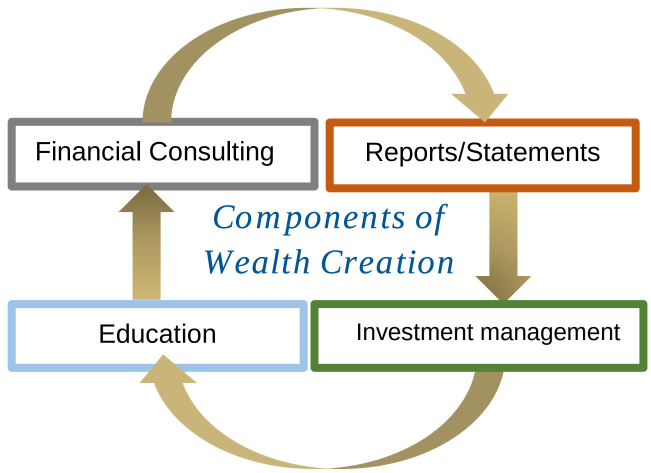
HalpernFinancial

Client Service Calendar

EveryDay

- Team of experts available to you
- Guarding your wealth through cybersecurity
- 24/7 access to online performance
- Financial Life Overview dashboard



EveryMonth

- Ongoing portfolio monitoring
- Manage deposits, withdrawals, rebalancing
- Ongoing investment and economic research
- Custodian statements
- Weekly financial planning blog posts

EveryQuarter

- Portfolio rebalancing
- Performance report
- Investment Review and Market Review

EveryYear

- Client meetings
- Tax package sent to you or your CPA
- Tax loss trading
- Required Minimum Distribution strategy
- Review outside retirement plans
- Alerts with analysis of notable market activity

WealthPlanning

- Financial projections for major decisions
- Coordinating with your professional team
- Estate Plan and Risk Management review
- Portfolio Development Report
- College Projections
- Retirement Projections
- Cash Flow Analysis
- Business Cash Flow Modeling
- Retirement Income Security Plan
- Multi-Generational Wealth Planning

* Certain components occur throughout the year. The timing of services varies by the client’s individual needs.

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