



WEISS
FINANCIAL
GROUP

Option 1

Financial Planning

\$5,000

For Initial Plan

+\$500/month

For on-going planning service

Initial Plan Includes:

- 2-3 meetings for plan development
- Secure Client Website access
- Email summaries with action plans
- Electronic copy of final plan

Topics Covered Can Include:

- Goal Setting
- Budget Review
- Retirement cash flow analysis
- Social Security maximization
- Systematic withdrawal plan
- Tax efficient withdrawals
- Bucketing strategies
- Pension Claiming Options
- Health Care and LTC issues

On-going Planning Service Includes:

- Plan implementation assistance
- Plan monitoring
- Annual review
- Client website access
- Email support

Option 2

Investment Management & Financial Planning

0.85% - 1.5%

*Fee is based on total
assets under management
(\$500,000 minimum)*

Includes:

- All Option 1 services
- All initial plan services
- All planning topics
- All on-going planning services

Plus:

- Investment Policy Statement
- Asset allocation
- Risk assessment & monitoring
- Investment selection
- Fund manager selection
- Portfolio construction
- Portfolio implementation
- Monitoring investor objectives
- Monitoring fund managers
- Portfolio rebalancing
- Portfolio revisions
- Accounts held at Charles Schwab
- Monthly statements
- Quarterly performance reports
- Quarterly market updates
- Review meetings
- Check-ins