Retirement Matters Inc.

When it comes to planning and investments, finding the services that suit you can require some detailed conversation and understanding. This matrix should help you understand the various services offered by Retirement Matters.

Services	One-Time Financial Plan	Wealth Management *
Financial Goal Setting	x	x
Life Planning / Values Based Planning		x
Net Worth & Cash Flow Review	x	x
Income Tax Planning	x	Advanced
Ongoing Tax Review and Filing		x
Education Funding Planning	x	x
Employee Benefit Planning	x	x
Corporate Stock Fund Planning	x	x
Retirement Planning	x	Advanced
Portfolio & Investment Analysis	x	x
Proposed Investment Changes	x	x
Ongoing Investment Management		x
Retirement Income Planning		Advanced
Insurance Needs Analysis	x	x
Estate Planning Review	x	x
Number of meetings	1 initial, 2 plan presentation	Minimum of 2x/year
Ongoing access to planner	Review service priced at $2,500	x
Pricing	$4,000	$1M-$3M: 1% of portfolio balance $3M+: 0.5% of portfolio balance

* Minimum annual fee: $10,000. Tax planning and preparation by Willow CPA Group in Inverness, IL.

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