Retirement Matters Inc.

When it comes to retaining a financial advisor, you need to understand how services change between a one-time engagement versus an ongoing relationship.

Services	One-Time Financial Plan	Ongoing Wealth Management
Financial Goal Setting	x	x
Life Planning / Values Based Planning		x
Retirement Transition Coaching		x
Net Worth & Cash Flow Review	x	x
Income Tax Planning	Basic	Advanced
Ongoing Tax Review and Filing *		x
Education Funding Planning	x	x
Employee Benefit Planning	x	x
Corporate Stock Fund Planning	Basic	Advanced
Retirement Planning	x	Advanced
Portfolio & Investment Analysis	x	x
Proposed Investment Changes	Basic	Advanced
Ongoing Investment Management		x
Tax-sensitive Asset Allocation		x
Asset Location Monitoring		x
Tax-Loss and Gain Harvesting		x
Retirement Income Planning		Advanced
Management of Retirement Income		x
Insurance Needs Analysis	x	x
Estate Planning Review	x	x
Charitable Strategy Planning		x
Ongoing Collaboration with other related professionals (attorney, etc.)		x
Number of meetings	1 initial, 2 plan presentation	Minimum of 2x/year
Ongoing access to planner	Review service priced at $2,500	x
Limited client roster		x
In-person meetings across the USA		x
Pricing	$4,000	1% of portfolio balance**

* Retirement Matters will cover the cost of filing with our partnered tax professionals.
** Minimum annual fee: $10,000. Portfolio balances over $3,000,000 billed at 0.5%.

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