FORWARD » THINKING
WEALTH MANAGEMENT

Platinum Service – The New Standard in Personalized Wealth Management

INVESTMENT MANAGEMENT SERVICES

- Develop a written investment policy statement to identify investment objectives and risk profile
- Review your investments and design personalized portfolios to match your goals, timeline and risk tolerance
- Monitor your investments on a daily basis
- Review and evaluate your portfolios on a quarterly or more frequent basis
- Deliver independent, objective advice by a fiduciary, fee-only, Certified Financial Planner™
- Provide 24-hour electronic access to current investment information
- Perform an objective review of asset allocation within your employer provided retirement plan (401k) and implement recommendations
- Semi-annual and annual review meetings.

RETIREMENT INCOME AND DISTRIBUTION PLANNING

- Analyze income needs - now and in retirement
- Develop a written distribution plan
- Develop and implement recommendations to fund your income needs and help maintain a comfortable standard of living
- Recommend strategies to optimize the distributions from employer retirement plans and IRAs.

TAX REDUCTION PLANNING

- Coordinate with your tax preparer for year-round, proactive tax planning.
- Recommend tax solutions, including tax-advantaged solutions
- Construct retirement distribution strategies to optimize tax planning strategies

RISK MANAGEMENT SERVICES

- Use cutting-edge technology to evaluate your risk tolerance
- Review life, disability, and long-term care insurance coverage and needs
- Provide an independent insurance needs analysis

ESTATE PLANNING REVIEWS

- Analyze current estate plan
- Collaborate with estate planning attorney
- Ensure respective accounts are titled in accordance with estate planning documents

FINANCIAL CARETAKING

- Develop Risk Profile to determine if a client is at a higher risk for financial exploitation
- Create formal Financial Caretaking plan to address financial management challenges as client ages
- Establish Proactive Aging Plan related to numerous items related to quality of life

CLIENT SERVICES AND COMMUNICATIONS

- Provide weekly emails developed specifically for Forward Thinking Wealth Management clients
- Distribute special communications, as needed, to address events related to your wealth management needs
- Offer access to Dan Johnson, CFP® - including his personal cell number.