



TFP Service Offerings

Financial & Tax Planning

- Initial Income Tax Review
- Annual Tax Planning
- Multi-Year Tax Planning
- Social Security Strategies
- Retirement Readiness Analysis
- Retirement Withdrawal Strategies
- Pension Option Evaluation
- Stock Option Planning
- Business Planning
- Insurance Analysis & Review
- Understanding Your Estate Plan
- College Savings / Affordability Planning
- Unlimited Meetings as Needed
- Unlimited Follow Up via Email or Phone

Financial Tune Up <i>(Stand Alone Project)</i>	Wealth Management	Investment Management
X	X	
	X	
	X	
X	X	
X	X	X
X	X	
X	X	
	X	
	X	
X	X	
X	X	
X	X	
	X	
	X	

Investment Management

- Risk Tolerance Identification
- Asset Allocation Strategy
- Ongoing Investment Management
- Low Cost Investment Selection
- Asset Allocation Monitoring / Rebalancing
- Tax Loss Harvesting
- Tax Efficient Asset Location incl 401k
- IRA Distribution Management

	X	X
	X	X
	X	X
	X	X
	X	X
	X	X
	X	
	X	X

Fees

Calculation Method	Flat Fee	Formula*	0.90% of Assets Mgd**
Minimum Fee	\$975	\$1,500 / qtr	\$500 / qtr

* Formula is based on investable assets, other net worth, income and complexity
 ** Investment mgt fee is reduced for managed assets greater than \$500,000