THIRD ACT
RETIREMENT PLANNING

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 Third Act Retirment Planning.

SERVICES	One-Time, Comprehensive Plan	Comprehensive Planning with Ongoing Support	Investment Management *	Wealth Management **
Financial Goal Setting	X	X	X	X
Life Planning				X
Net Worth & Cash Flow Review	X	X		X
Income Tax Planning	X	X		X
Ongoing Tax Review and Filing				X
Education Funding Planning	X	X		X
Employee Benefit Planning	X	X		X
Retirement Planning, incl. Employer Plans	X	X		X
Portfolio & Investment Analysis	X	X	X	X
Detailed, Proposed Investment Changes	X	X	X	X
Ongoing Investment Management			X	X
Insurance Needs Analysis	X	X		X
Estate Planning Review	X	X		X
Continual access to planner		X	Limited	X
Review meeting every 12 months	$2,000	X	X	X
PRICING	**Initial: $3,000**	**Initial: $3,000 & $250/mo.**	**Minimum: $250,000**	**Minimum: $750,000**

* $250,000 portfolio minimum. Fee is a percentage of portfolio balance, billed on a quarterly basis.
** Minimum annual fee: $7,500. Tax planning and preparation by locally operated and experienced CPA.

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