Gold Medal Services

At Elliott Wealth Management Services LLC, Our Clients Come First

Our approach to delivering comprehensive financial services always starts and ends with you, our clients. We begin this process by listening to you and discussing your lifestyles, goals, wishes, dreams, and family situations. Through a consultative process we then learn the details of your financial picture so we can construct and deliver a customized plan along with your personal **Financial Action Checklist**.

Our experienced team of professionals fully evaluates your situation to prepare personal solutions that integrate investment planning, tax reduction planning, retirement income and distribution planning, and family wealth planning.

Our Professional Services

- **Financial Planning Experience**: Our dedicated financial professionals have the credentials and years of experience required to develop a plan tailored to your needs.
- **Continuous Communication:** Our job is to keep in touch with you to ensure your plan is up to date. We will schedule reviews with you to make sure you have the most optimal plan in place.
- **Responsiveness:** We are there for you when you need us.
- **Personalized Advice:** We make sure to dive deep into your perspective to determine the best plan suited to your wants and your needs.
- **Content:** We provide informative podcasts, newsletters, tax reports, and other helpful materials.
- **Events:** We host client appreciation events, webinars, & other educational events
- **Elliott Wealth Success Planner:** We provide powerful financial planning software to track financial goals, calculate net worth, and create a retirement analysis.

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Investment Oversight

- ☑ Designing a personal portfolio to appropriate for your needs
- ☑ Year-long, continual monitoring of your investments
- ☑ Independent advice
- ☑ Regular meetings to review and evaluate your investment performance
- ☑ Recommendations regarding your employer sponsored retirement plans such as 401(k)s

Tax Reduction Planning

- ☑ Complimentary consultation with your tax preparer
- ☑ Recommendations of tax solutions including tax advantaged investments
- ☑ Regular review of your tax situation and planning to incorporate any new tax law changes
- ☑ Staying up-to-date on and presenting new tax laws that can affect your situation

Retirement Income & Distribution Planning

- ☑ Analysis of your income needs now and in the future
- ☑ Continual development and implementation of recommendations to fund your income needs and help maintain a comfortable standard of living
- ☑ Recommendations regarding the most appropriate distribution strategy for your employer retirement plans and IRAs
- ☑ Analysis of the beneficiaries of your retirement accounts

Family Wealth Planning

- ☑ Analysis of your current estate plan and concerns
- ☑ Complimentary consultation with your attorney
- ☑ Review of life insurance policies, including analysis of the beneficiary designations
- ☑ Assistance in transferring assets to your Living Trust or other trusts
- ☑ Provide guidance with the appropriate and necessary steps in the event of the death of a loved one

Client Services & Communications

- ☑ Regular Zoom, in person, or phone review meetings
- ☑ The Simply Financial Podcast
- ☑ Live educational webinars
- ☑ Monthly educational newsletters, emails, & market updates
- ☑ Special client appreciation events