PLATINUM WEALTH SOLUTIONS OF TEXAS, LLC

FINANCIAL PLANNING UNIT SERVICES MENU

MORNINGSTAR

Analyzes a client's overall portfolio and individual investments.

NEEDS ANALYSIS

Focuses on core modules: Cashflow & net worth; Asset allocation; Retirement; Survivor needs; Disability needs; Long-term care; Education funding.

SOCIAL SECURITY

Calculates a client's Social Security options and most efficient filing strategy based on PIA and life expectancy.

401(K) PLAN SUPPORT

Utilizes the RPAG platform to benchmark current qualified plans for fees and investments, and creates robust proposals for new and takeover plans. Supports advisors' qualified plan business with review documents, investment policy statements, and client communications.

FEE-BASED FINANCIAL PLANNING

Incorporates a comprehensive financial analysis with fully customized observations and recommendations to meet a client's needs. It offers extensive estate planning modeling. Advisors charge a fee for planning based on published or customized fee schedule. (additional fee to advisor).

COMPREHENSIVE FINANCIAL ANALYSIS

Illustrates a comprehensive cashflow based financial plan tailored to a client's individual needs and goals. Includes estate planning functionality and what-if scenario modeling. Also includes a client financial website that offers aggregation of client's accounts and a vault in which valuable documents can be stored.

OTHER FEATURES

- Reduced subscription cost for eMoney platform for advisors.
- Unless otherwise noted, all services are included for all advisors on the fully housed platform. No additional fees to the advisor.

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