Service Checklist

	Investment-Only $100,000 Minimum	Full Service $500,000 Minimum	Financial Coaching No Asset Minimum	Institutional $500,000 Minimum
Client Profile	Investment management and basic retirement projection only. Generally designed for investors that have not yet accumulated significant wealth but need professional investment management and basic planning guidance.	Combined financial planning, investment management, and tax preparation service in a single offering for one simple, competitive fee. Generally designed for those with enough wealth to benefit from a truly integrated wealth management approach with the goal of maximizing the impact of their resources now and for generations to come.	Learn how to take control of your money with hourly professional coaching. Generally designed for those with targeted planning needs and questions or that have no wealth that can be managed by a professional advisor at this time.	Investment management and planning services flexibly tailored around the needs of organizations. Generally designed for institutional investors, such as endowments, foundations, corporations and retirement plan clients.

Services

	Investment-Only	Full Service	Financial Coaching	Institutional
Investment Management	✓	✓	✗	✓
Financial Planning	✗	✓	✓	✓
Tax Planning & Preparation	✗	✓	✗	✗

Support

	Investment-Only	Full Service	Financial Coaching	Institutional
Fiduciary Oath	✓	✓	✓	✓
Advisor Consultation	Investment Only	All Financial Topics	All Financial Topics	All Financial Topics
Concierge Support	✓	✓	✓	✓
Document Review & Organization	✓	✓	✗	✓
Web Access & Reporting	✓	✓	✗	✓
Annual Review	✓	✓	✗	✓
Market Commentary	✓	✓	✗	✓
Educational Events	✓	✓	✗	✓

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