

Gold Medal Services

“The New Standard in Personalized Wealth Management”

Investment “SURVEILLANCE” Service

- Reviewing your investments and designing a personalized portfolio appropriate to your needs
- Year-long, continual monitoring of your investments
- Quarterly meetings to: review and evaluate your investment performance, update your overall financial objectives and if necessary, reallocate your portfolio as agreed upon by you
- Quarterly Statements
- Independent Advice
- Option of Commission-free transactions on most stocks, bonds or mutual funds traded in your account with our wrap account platform (certain transaction fees may apply)
- Recommendations regarding positioning of funds within your employer provided retirement plans such as 401(k)s
- Quarterly “market watch” letter detailing our firm’s research, analysis and view of the current state of the investment markets

Tax Reduction Planning

- Comprehensive review of your tax return to highlight opportunities for maximizing tax reduction strategies
- Quarterly review of your tax situation and planning to incorporate any new tax law changes
- Free consultation with your tax preparer
- Recommendations of tax solutions including tax advantaged investments
- Staying up-to-date on and presenting new tax laws that can effect 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 best distribution strategy for your employer retirement plans and IRAs
- Analysis of the beneficiaries of your IRAs and how to establish an Inherited IRA to continue your IRA for up to 70 years or longer after you pass away

Family Wealth Planning

- Analysis of your current estate plan and concerns
- Free consultation with your attorney
- Assistance in transferring assets to your Living Trust or other trusts
- Providing guidance with the appropriate and necessary steps in the event of the death of a loved one

Client Services & Communications

- Quarterly Newsletter to keep you apprised of the most current planning options
- Quarterly Reviews
- Special reports on how to reduce your taxes and other important topics
- Debt analysis and review of existing real estate lending strategies
- Special Gold Medal Service Events, including client appreciation events (where you may bring up to 2 guests)