



Services Comparison Sheet

Below is a chart comparing the differences in the Money Management and Wealth Management service offerings. Use this to identify the type of service best suited to your needs.

Service	Money Management	Wealth Management
Investment Management	✓	✓
Annual Tax Reporting	✓	✓
Quarterly Updates	✓	✓
Separately Managed Accounts*	✓	✓
A Core Portfolio of Individual Stocks*	✓	✓
Private Placement Securities*	✓	✓
Special Reports*	✓	✓
Discussions to Define Personal Goals and Cash Flow Needs		✓
Creation and Maintenance of Customized Financial Model		✓
Achievements & Actions List		✓
Year-End Tax Planning		✓
Coordination with Tax and Estate Planning Attorney		✓
Regular Meetings with Professional Advisors In Person*		✓
Multigenerational Advising		✓

*Available on a select basis