



**Basic & Silver
Holistic Planning**

**Gold & Platinum
Advanced Holistic Planning**

	<i>BASIC</i> Free	<i>SILVER</i> \$1,500	<i>GOLD</i> \$3,000	<i>PLATINUM</i> \$5,000
Annual Review Meeting	✓	✓	✓	✓
Estate Plan Document Review ¹	✓	✓	✓	✓
Home and Auto Insurance Review	✓	✓	✓	✓
Life Insurance Review	✓	✓	✓	✓
Medicare Insurance Review ²	✓	✓	✓	✓
Tax Return Review ³	✓	✓	✓	✓
Annual Review Meeting		✓	✓	✓
Dedicated Service Team		✓	✓	✓
Consolidated Asset Sheet		✓	✓	✓
Income / Income Gap Review		✓	✓	✓
VTA Review		✓	✓	✓
RMD Recommendations		✓	✓	✓
Beneficiary Designation Review		✓	✓	✓
The Family Estate Organizer*		✓	✓	✓
Estate Settlement Services		✓	✓	✓
Social Security Review		✓	✓	✓
Income Tax Reduction Strategies		✓	✓	✓
Long Term Care Review		✓	✓	✓
Semi-Annual Review Meeting			✓	✓
Net Worth Review			✓	✓
Advice on Outside Accounts			✓	✓
Final Settlement Planning Organizer			✓	✓
General Financial Advice			✓	✓
Asset Transfer Strategies			✓	✓
Roth Conversion Review			✓	✓
Beneficiary IRA Review			✓	✓
Tax Preparation			✓	✓
Quarterly Review Meetings				✓
Estate Tax Reduction Strategies				✓
Charitable Tax Planning				✓
Tax Loss Harvesting Strategies				✓

¹Legal document review provided by independent counsel, update to documents may require additional fee. ²For clients 65 and older. ³Amendment to return may require additional fee.
*For the Gold and Platinum Packages the Family Estate Organizer is included in the Final Settlement Planning Organizer.