Gold Medal Services

"The New Standard in Personalized Wealth Management"

Investment "Watch Dog" Service

- Reviewing your investments and designing a personalized portfolio based on your profile and your needs
- Year-long, continual monitoring of your investments
- Regular 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
- Sound, Independent, and Objective Advice
- Quarterly rebalancing of your portfolio as per your planning profile
- Commission-free transactions on your customized investment portfolio; fee-based only
- 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

Business & Individual Income Tax Reduction Planning

- Comprehensive review of business as well as personal income tax returns to highlight opportunities for maximizing tax reduction strategies
- Routine review of your tax situation and planning to incorporate applicable tax law changes
- Consultations in conjunction with your CPA regarding tax projections and tax ramifications
- Consultations with Actuary regarding the initial setup and maintenance of qualified pension plans
- Recommendations of tax solutions including tax advantaged investments

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

Family Wealth Planning

- Analysis of your current estate plan, estate tax issues as well as general concerns
- Consultations with your estate planning attorney, personal representative, and beneficiaries
- Assistance in transferring assets to your Living Trust, other trusts, or beneficiaries
- 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/ Semi-Annual or Annual Reviews based on needs
- Special reports on how to reduce your taxes and other important topics
- Special Gold Medal Service Events, educational workshops, including client appreciation events (where you may bring up to 2 guests)

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